The Fishing Industry in Quebec

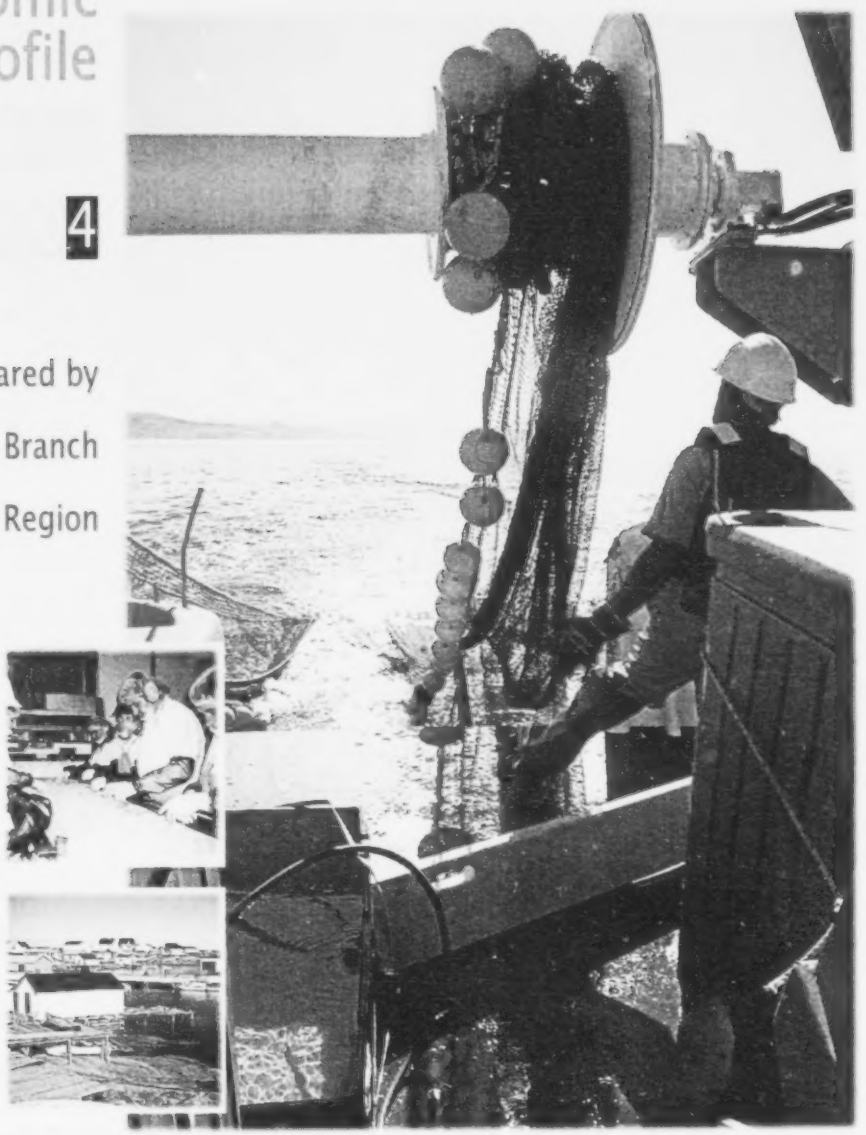
Socio-Economic Profile

4

Prepared by

Policy and Economic Branch

Quebec Region



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THE FISHING INDUSTRY IN QUEBEC
SOCIO-ECONOMIC PROFILE

GASPÉ AREA

May 2004

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ACRONYMS

BAPAP: *Bureau d'accréditation des pêcheurs et aides-pêcheurs du Québec*
CRIQ: *Centre de recherche industriel du Québec*
DFO: Fisheries and Oceans Canada
DRPE: Policy and economics Branch
HRSDC: Human Resources and Skills Development Canada
MAPAQ: *Ministère de l'Agriculture, des Pêcheries et de l'Alimentation du Québec*

ABBREVIATIONS

$M: millions of dollars
$B: billions of dcilars
$K: thousands of dollars

SYMBOLS

p: preliminary
no: number

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TABLE OF CONTENTS

Introduction 1

1. The Gaspé Area: A Socio-Economic Portrait 3
1.1. Demographic Context 3
1.2. Level of Education 4
1.3. Participation Rate and Unemployment Rate 5
1.4. Development and Composition of Income 6
1.5. Sectors of Activity 7
1.6. Labour Market Indicators for the Gaspé Area-Magdalen Islands Region 9
1.7. Labour Market Indicators for the Lower St. Lawrence Region 14

2. The Fishing Industry in the Gaspé Area: An Overview 19
2.1. Marine Fisheries 19
2.1.1. Evolution of Landings 19
2.1.2. Species Landed 21
2.1.3. Workforce 22
2.1.4. First Nations of the Gaspé Area 24
2.2. Processing of Fishery Resources 26
2.2.1. Evolution of Sales 26
2.2.2. Species Sold 27
2.2.3. Labour 28
2.2.4. Businesses 29
2.2.5. Outlook for 2003 29

3. The Fishing Industry in Gaspé North: An Overview 31
3.1. Marine Fisheries 31
3.1.1. Evolution of Landings 31
3.1.2. Species Landed 32
3.1.3. Workforce 33
3.2. Processing of Fishery Resources 35
3.2.1. Evolution of Sales 35
3.2.2. Species Sold 36
3.2.3. Labour 37
3.2.4. Businesses 37
3.2.5. Outlook for 2003 38

4. The Fishing Industry in Gaspé East: An Overview 39
4.1. Marine Fisheries 39
4.1.1. Evolution of Landings 39

4.1.2. Species Landed 40
4.1.3. Workforce 41
4.2. Processing of Fishery Resources 43
4.2.1. Evolution of Sales 43
4.2.2. Species Sold 44
4.2.3. Labour 44
4.2.4. Businesses 45
4.2.5. Outlook for 2003 45

5. The Fishing Industry in Gaspé South: An Overview 47
5.1. Marine Fisheries 47
5.1.1. Evolution of Landings 47
5.1.2. Species Landed 48
5.1.3. Workforce 49
5.2. Processing of Fishery Resources 51
5.2.1. Evolution of Sales 51
5.2.2. Species Sold 52
5.2.3. Labour 53
5.2.4. Businesses 54
5.2.5. Outlook for 2003 54

6. The Fishing Industry in Baie-des-Chaleurs: An Overview 55
6.1. Marine Fisheries 55
6.1.1. Evolution of Landings 55
6.1.2. Species Landed 56
6.1.3. Workforce 57
6.2. Processing of Fishery Resources 60
6.2.1. Evolution of Sales 60
6.2.2. Species Sold 60
6.2.3. Labour 61
6.2.4. Businesses 62
6.2.5. Outlook for 2003 62

Summary and Conclusion 63

Appendix 64

LIST OF GRAPHS

Graph 1: Distribution of the Population in the Maritime Sectors, 2001 3
Graph 2: Population Development in the Gaspé Area, 1986 to 2001 3
Graph 3: Evolution of the Age Pyramid for the Gaspé Area between 1996 and 2001 4
Graph 4: Age Pyramids for the Gaspé Area and Quebec, 2001 4
Graph 5: Evolution of the Level of Education in the Gaspé Area, 1991 to 2001 5
Graph 6: Evolution of the Level of Education in Quebec, the Gaspé Area and the Fishing Industry, 2001 5
Graph 7: Participation Rate and Unemployment Rate in Maritime Sectors and Quebec, 2001 5
Graph 8: Participation Rate and Unemployment Rate for the Gaspé Area, 2001 5
Graph 9: Evolution of the Average Income in Quebec, Gaspé Area and the Fishing Industry, 1985 to 2000 6
Graph 10: Composition of the Average Income for the Population, 2000 6
Graph 11: Distribution of the Active Population, According to Sectors of Economic Activity and Maritime Sector, 2001 7
Graph 12: Proportion of the Population Aged 15 Years and Older in the Primary and Secondary Sectors of the Fishing Industry in the Gaspé Area, 2001 7
Graph 13: Distribution of Employment in 2001-2003, Gaspé Area-Magdalen Islands 11
Graph 14: Distribution of Employment in 2001-2003, Lower St. Lawrence 16
Graph 15: Distribution of Landings in Quebec's Maritime Sectors, in Volume, 2003p 19
Graph 16: Distributions of Landings in Quebec's Maritime Sectors, in Value, 2003p 19
Graph 17: Evolution of Landings in the Fishing Industry, Gaspé Area, 1985-2003p 20
Graph 18: Evolution of Landings in the Gaspé Area by Sub-Sector, in Volume, 1985-2003 21
Graph 19: Evolution of Landings in the Gaspé Area by Sub-Sector, in Value, 1985-2003 .. 21
Graph 20: Breakdown of Species Landed, in Volume, Gaspé Area, 2003p 22
Graph 21: Breakdown of Species Landed, in Value, Gaspé Area, 2003p 22
Graph 22: Distribution of Fishing Businesses According to Main Species Landed, Gaspé Area, 2003p 22
Graph 23: Distribution of Fishermen and Fisherman's Helpers According to Age, Gaspé Area, 2003p 22

Graph 24: Evolution of the Number of Fishermen According to Age, Gaspé Area, 1985-2003p 23
Graph 25: Evolution of the Number of Licences According to Status, Gaspé Area, 1985-2003p 23
Graph 26: Evolution of the Number of Active Fishing Boats According to Size, Gaspé Area, 1990-2003p 24
Graph 27: Evolution of the Number of Active Fishing Boats According to Age, Gaspé Area, 1999-2003p 24
Graph 28: Evolution of Landings by First Nations in the Gaspé Area, 2000-2003p 25
Graph 29: Distribution of the Sale of Marine Products in the Maritime Sectors of Quebec, 2002 26
Graph 30: Evolution of Sales for Processing Businesses in the Gaspé Area, 1990 to 2002 26
Graph 31: Value and Composition of Production in the Gaspé Area, 2002 27
Graph 32: Composition of Species Sold, % of Value, Gaspé Area, 2002 28
Graph 33: Composition of Species Sold, % of Value, Gaspé Area, 1990 to 2002 28
Graph 34: Number of Jobs in the Marine Product Processing Sector, Gaspé Area, 1990 to 2002 29
Graph 35: Evolution of Landings in the Gaspé Area by Sub-Sector, in Volume, 2003p 31
Graph 36: Evolution of Landings in the Gaspé Area by Sub-Sector, in Value, 2003p 31
Graph 37: Evolution of Landings in the Fishing Industry, Gaspé North, 1985-2003p 32
Graph 38: Breakdown of Species Landed, in Volume, Gaspé North, 2003p 33
Graph 39: Breakdown of Species Landed, in Value, Gaspé North, 2003p 33
Graph 40: Distribution of Fishing Businesses, According to Main Species Landed, Gaspé North, 2003p 33
Graph 41: Distribution of Fishermen and Fisherman's Helpers According to Age, Gaspé North, 2003p 33
Graph 42: Evolution of the Number of Fishermen According to Age, Gaspé North, 1985-2003p 34
Graph 43: Evolution of the Number of Licences According to Status, Gaspé North, 1985-2003p 34
Graph 44: Evolution of the Number of Active Fishing Boats According to Size, Gaspé North, 1990-2003p 34
Graph 45: Evolution of the Number Active Fishing Boats According to Age, Gaspé North, 1999-2003p 34

Graph 46: Distribution of the Sale of Marine Products in the Maritime Sectors of Quebec, 2002 35
Graph 47: Evolution of Sales for Processing businesses in Gaspé North, 1990 to 2002 35
Graph 48: Value and Composition of Production in Gaspé North, 2002 36
Graph 49: Composition of Species Sold, % of Value, Gaspé North, 1990 to 2002 36
Graph 50: Number of Jobs in the Marine Product Processing Sector, Gaspé North, 1990 to 2002 37
Graph 51: Evolution of Landings in the Gaspé Area by Sub-Sector, in Volume, 2003p 39
Graph 52: Evolution of Landings in the Gaspé Area by Sub-Sector, in Value, 2003p..... 39
Graph 53: Evolution of Landings in the Fishing Industry, Gaspé East, 1985-2003p..... 40
Graph 54: Breakdown of Species Landed, in Volume, Gaspé East, 2003p 41
Graph 55: Breakdown of Species Landed, in Value, Gaspé East, 2003p 41
Graph 56: Distribution of Fishing Businesses, According to Main Species Landed , Gaspé East, 2003p 41
Graph 57: Distribution of Fishermen and Fisherman's Helpers According to Age, Gaspé East, 2003p 41
Graph 58: Evolution of the Number of Fishermen According to Age, Gaspé East, 1985-2003p 42
Graph 59: Evolution of the Number of Licences According to Status, Gaspé East, 1985-2003p 42
Graph 60: Evolution of the Number of Active Fishing Boats According to Size, Gaspé East, 1990-2003p 42
Graph 61: Evolution of the Number of Active Fishing Boats According to Age, Gaspé East, 1999-2003p 42
Graph 62: Distribution of the Sale of Marine Products in the Maritime Sectors of Quebec, 2002 43
Graph 63: Evolution of Sales for Processing Businesses in Gaspé East, 1990 to 2002..... 43
Graph 64: Value and Composition of Production in Gaspé East, 2002..... 44
Graph 65: Composition of Species Sold, % of Value, Gaspé East, 1990 to 2002..... 44
Graph 66: Number of Jobs in the Marine Product Processing Sector in Gaspé East, 1990 to 2002 45
Graph 67: Evolution of Landing in the Gaspé Area by Sub-Sector, in Volume, 2003p..... 47
Graph 68: Evolution of Landing in the Gaspé Area by Sub-Sector, in Value, 2003p 47
Graph 69: Evolution of Landings in the Fishing Industry, Gaspé South, 1985-2003p 48

Graph 70: Breakdown of Species Landed, in Volume, Gaspé South, 2003p 49
Graph 71: Breakdown of Species Landed, in Value, Gaspé South, 2003p 49
Graph 72: Distribution of Fishing Businesses According to Main Species Landed, Gaspé South, 2003p 49
Graph 73: Distribution of Fishermen and Fisherman's Helpers According to Age, Gaspé South, 2003p 49
Graph 74: Evolution of the Number of Fishermen According to Age, Gaspé South, 1985-2003p 50
Graph 75: Evolution of the Number of Licences According to Status, Gaspé South, 1985-2003p 50
Graph 76: Evolution of the Number of Active Fishing Boats According to Size, Gaspé South, 1990-2003p 50
Graph 77: Evolution of the Number of Active Fishing Boats According to Age, Gaspé South, 1999-2003p 50
Graph 78: Distribution of the Sale of Marine Products in the Maritimes Sectors of Quebec, 2002 52
Graph 79: Evolution of Sales for Processing Businesses in Gaspé South, 1990 to 2002 52
Graph 80: Value and Composition of the Production in Gaspé South, 2002 53
Graph 81: Composition of Species sold, % of Value, Gaspé South, 1990 to 2002 53
Graph 82: Number of Jobs, Marine Product Processing Sector in Gaspé South, 1990 to 2002 54
Graph 83: Evolution of Landings in the Gaspé Area by Sub-Sector, in Volume, 2003p 55
Graph 84: Evolution of Landings in the Gaspé Area by Sub-Sector, in Value, 2003p 55
Graph 85: Evolution of Landings in the Fishing Industry, Baie-des-Chaleurs, 1985-2003p 56
Graph 86: Breakdown of Species Landed, in Volume, Baie-des-Chaleurs, 2003p 57
Graph 87: Breakdown of Species Landed, in Value, Baie-des-Chaleurs, 2003p 57
Graph 88: Distribution of Fishing Businesses According to Main Species Landed, Baie-des-Chaleurs, 2003p 57
Graph 89: Distribution of Fishermen and Fisherman's Helpers According to Age, Baie-des-Chaleurs, 2003p 57
Graph 90: Evolution of the Number of Fishermen According to Age, Baie-des-Chaleurs, 1985-2003p 58
Graph 91: Evolution of the Number of Licences According to Status, Baie-des-Chaleurs, 1985-2003p 58

Graph 92: Evolution of the Number of Active Fishing Boats According to Size, Baie-des-Chaleurs, 1990-2003p 59
Graph 93: Evolution of the Number of Active Fishing Boats According to Age, Baie-des-Chaleurs, 1999-2003p 59
Graph 94: Evolution of the Sale of Marine Products in the Maritime Sectors of Quebec, 2002 60
Graph 95: Evolution of Sales for Processing Businesses in Baie-des-Chaleurs, 1990 to 2002 60
Graph 96: Value and Composition of Production in Baie-des-Chaleurs, 2002 61
Graph 97: Composition of Species Sold, % of Value, Baie-des-Chaleurs, 1990 to 2002 61
Graph 98: Number of Jobs in the Marine Product Processing Sector in Baie-des-Chaleurs, 1990 to 2002 62

LIST OF TABLES

Table 1: Population of Individuals Aged 15 Years and Older in the Fishing Industry in Quebec and the Maritime Sectors, 2001 8

Table 2: Main Labour Market Indicators for Gaspé Area-Magdalen Islands, 2001-2003 10

Table 3: Distribution of Employment among Industrial Groupings, Gaspé Area-Magdalen-Islands 12

Table 4: Main Labour Market Indicators for Lower St. Lawrence, 2001-2003 15

Table 5: Distribution of Employment among Certain Industrial Groupings, Lower St. Lawrence 17

Table 6: Main Businesses in the Gaspé Area, Marine Product Processing Sector, 2002 29

Table 7: Main Businesses in Gaspé North, Marine Product Processing Sector, 2002 37

Table 8: Main Businesses in Gaspé East, Marine Product Processing Sector , 2002 45

Table 9: Main Businesses in Gaspé South, Marine Product Processing Sector , 2002 54

Table 10: Main Businesses in Baie-des-Chaleurs, Marine Product Processing Sector , 2002 62

INTRODUCTION

This study draws a portrait of the Gaspé Area maritime sector and, more particularly, of its fishing industry. First, an analysis of the demographic and socio-economic trends is presented. Several variables made up this socio-economic portrait: population, level of education, participation rate, unemployment rate, composition of income and sector of economic activity. This analysis demonstrated the importance of the fishing industry for the communities of the Gaspé Area, and more specifically for some maritime sub-sectors.

Secondly, the fish harvesting sector is described and analyzed through the many elements that define it. Landings, both in terms of volume and value, are presented in a historical perspective. In order to reflect the harvest industry's current situation, the most recent fishing season was examined more closely. This section also contains information on the number of active fishermen, licences, the importance of certain species and many more details which provide a sound comprehension of this area of activity.

Furthermore, information concerning the commercial fishing activities of aboriginal communities is analyzed. This section allows us to note the increasing importance of this industry for these communities.

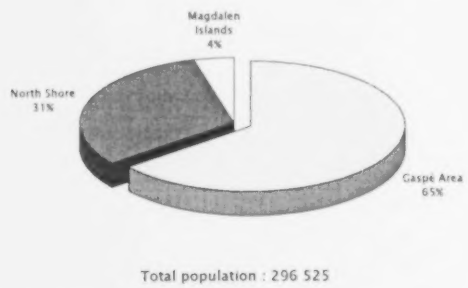
And finally, the last section deals with the marine product processing sector. Among other data, information is provided on the composition and the value for post-plant production, the number of jobs in this sector and the importance of certain species for this economic activity.

1. The Gaspé Area: A Socio-Economic Portrait

1.1. Demographic Context

In the maritime sectors[1] of Quebec, the Gaspé Area is the largest with 65% of the total population. The Gaspé Area consists of four maritime sub-sectors: Gaspé North, Gaspé East, Gaspé South and Baie-des-Chaleurs (see Appendix). According to the last census in 2001, the most populous sub-sector is Gaspé North with more than 120 000 inhabitants, which represented more than 63% of the Gaspé Area population. Baie-des-Chaleurs ranks second with about 33 000 inhabitants, followed by Gaspé South and Gaspé East, with 19 000 and 18 000 inhabitants, respectively.

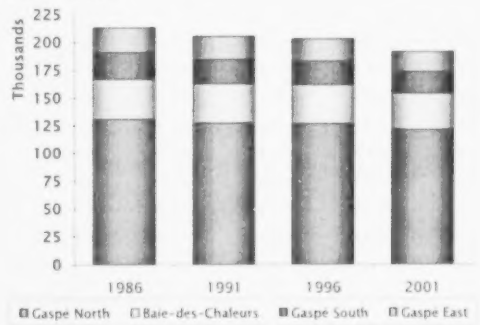
Graph 1: Distribution of the Population in the Maritime Sectors, 2001



Total population : 296 525

Source: Statistics Canada, 2001 Census, special compilations

Graph 2: Population Development in the Gaspé Area, 1986 to 2001



Source: Statistics Canada, 2001 Census, special compilations

While the population growth in Quebec is tailing off[2], the population in the Gaspé Area is declining year after year. The changing demographics in this region follow a negative trend during which the population has declined more than 10% between 1986 and 2001. The rhythm of this decline accelerated between 1996 and 2001, and accounted for about 6% of the population (11 700 people). During this period, the sub-sectors of Gaspé East and Gaspé South experienced the largest decline in population, 11% (2 300 inhabitants) and 10% (2 100 inhabitants), respectively. Finally, the sub-sector of Baie-des-Chaleurs reported a population decline of 6% (2 100 inhabitants), and as for Gaspé North, the decline was 4% (5 200 inhabitants). This situation has resulted in a drop in the

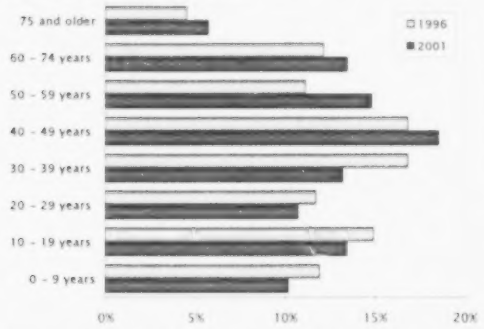
[1] The designation "maritime sector" used in this document refers to the geographical regions defined by Fisheries and Oceans Canada. The main maritime sectors are the Gaspé Area, the North Shore and the Magdalen Islands (see Appendix).

[2] Between 1996 and 2001, the population growth in Quebec was 1.1 %.

demographic weight of the Gaspé Area compared with the province of Quebec. In 2001, the population of the Gaspé Area represented 2.7% of the Quebec population compared with 3.3% in 1986. The demographic decline in the Gaspé Area has an impact on the economy since it lowers the demand for goods and services. There are fewer consumers purchasing goods and services in this region.

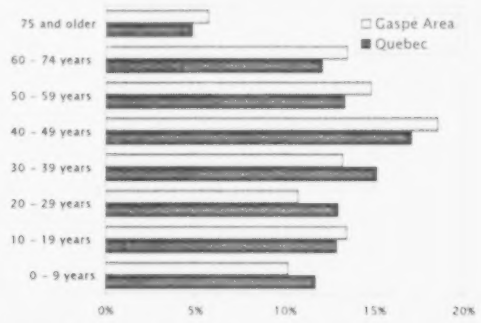
Moreover, these changes occurring in the population are not distributed evenly. In fact, as we observe the age distribution in the Gaspé Area, we notice the effect of the youth exodus and a greater proportion of people aged 40 and older. Between 1996 and 2001, the percentage of 15 to 39 year-olds in the Gaspé Area went from 36% to 31%. The largest decline is associated with people aged 30 to 39. This erosion at the base of the age pyramid can be seen in comparing the overall situation in Quebec to that in the Gaspé Area. The proportion of young people in the Gaspé Area is lower than in Quebec and the proportion of older people is higher.

Graph 3: Evolution of the Age Pyramid for the Gaspé Area between 1996 and 2001



Source: Statistics Canada, 2001 Census, special compilations

Graph 4: Age Pyramids for the Gaspé Area and Quebec, 2001



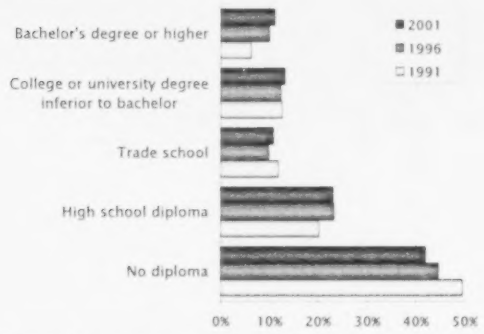
Source: Statistics Canada, 2001 Census, special compilations

1.2. Level of Education

For the last ten years, we have observed a positive trend in the level of education in the Gaspé Area. As the number of non-graduates follows a downward trend, we observe a growing number or people holding a Bachelor's degree or higher.

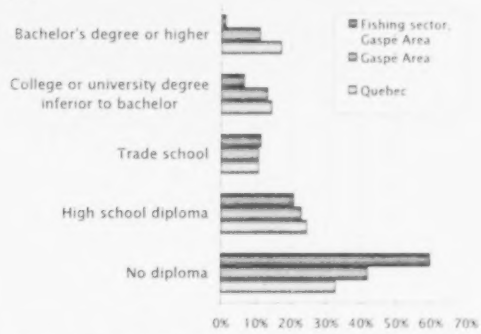
By comparing the different levels of education for Quebec, the Gaspé Area and its fishing industry, we notice major discrepancies. The number of people who do not hold a degree is higher in the Gaspé Area's fishing industry. This proportion follows a downward trend where it dropped from 70% in 1991 to 60% in 2001. We also observe that a growing number of people included in the fishing industry hold a trade school diploma, compared with the overall population of the Gaspé Area and Quebec.

Graph 5: Evolution of the Level of Education in the Gaspé Area, 1991 to 2001



Source: Statistics Canada, 2001 Census, special compilations

Graph 6: Evolution of the Level of Education in Quebec, the Gaspé Area and the Fishing Industry, 2001

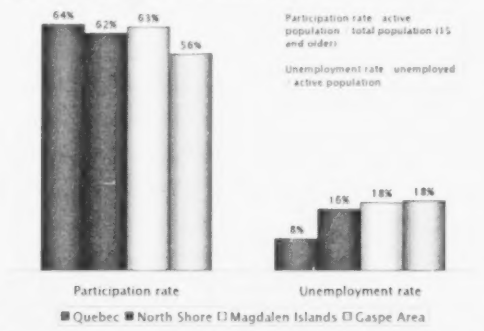


Source: Statistics Canada, 2001 Census, special compilations

1.3. Participation Rate and Unemployment Rate

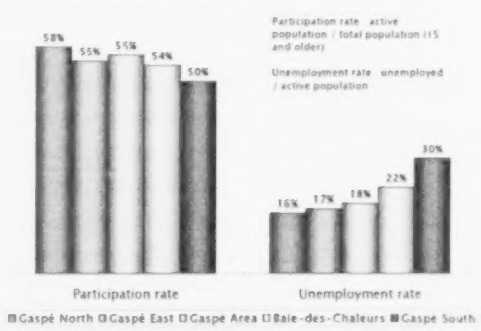
Unemployment rates in the maritime sectors are far higher than the Quebec average. The discrepancy between the Gaspé Area and Quebec has reached 10 percent, for an unemployment rate of 18% in 2001. Moreover, the regional differences in the Gaspé Area are not insignificant. The sub-sector of Gaspé South shows the highest unemployment rate in the Gaspé Area and the most populous sub-sector in the Gaspé Area, Gaspé North, has the lowest unemployment rate.

Graph 7: Participation Rate and Unemployment Rate in Maritime Sectors and Quebec, 2001



Source: Statistics Canada, 2001 Census, special compilations

Graph 8: Participation Rate and Unemployment Rate for the Gaspé Area, 2001



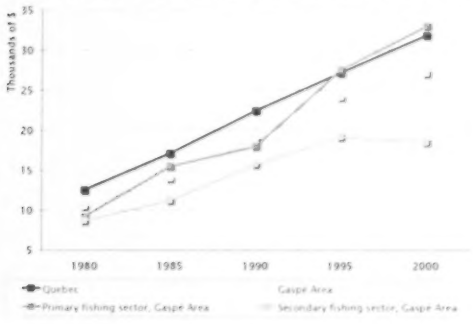
Source: Statistics Canada, 2001 Census, special compilations

The participation rate is very important in order to characterize the labour market. It expresses the proportion of active population compared with the total population aged 15 and older. This rate also shows the capacity of an economy to generate jobs. We observe that the participation rate for the Gaspé Area is the lowest of all of the maritime sectors. Also, Gaspé South presents the lowest participation rate, but also the highest unemployment rate in the Gaspé Area.

1.4. Development and Composition of Income

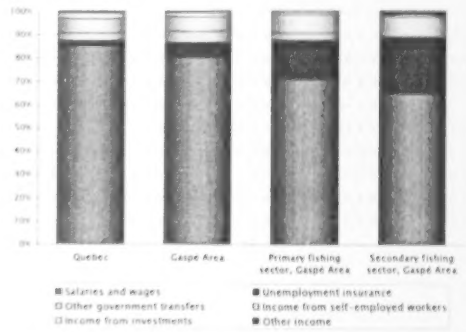
The average income of the Gaspé Area population is lower than its Quebec counterpart. In 2000, the discrepancy between the average income of the Gaspé Area's population and the population for Quebec was 15%. From 1995 to 2000, the growth of the Gaspé Area's population income reached 12%, but was still lower than Quebec (17%).

Graph 9: Evolution of the Average Income in Quebec, Gaspé Area and the Fishing Industry, 1985 to 2000



Source: Statistics Canada, 2001 Census, special compilations

Graph 10: Composition of the Average Income for the Population, 2000



Source: Statistics Canada, 2001 Census, special compilations

It must be noted that in 2000, the average income in the primary sector[3] of the Gaspé Area's fishing industry was comparable to Quebec. However, we observe a minor decline in the average income in the fisheries' secondary sector[4] for the period from 1995 to 2000. This decline follows the trend of the value for the production which declined close to 13% during the same period. Also, the average income in this sector is well below that of the population of Quebec and the Gaspé Area. In 2000, the gap widened and the difference compared to the Quebec average reached more than 40%. For the population working in this sector, the portion of average income coming from unemployment insurance (24%) is higher than the primary sector in the Gaspé Area, the overall population of the Gaspé Area (6%) and Quebec (2%).

Government transfer payments[5] are the main source of income for an important proportion of the population working in the fishing industry. In the primary sector, this proportion is

[3] The primary fishing sector refers to the capture of fish resources.

[4] The secondary fishing sector refers to the processing of fish resources.

[5] Government transfers: Income from all government transfers provided by federal, provincial or municipal governments. The payment of transfers include Old Age Pension and Guaranteed Income Supplements, benefits from the Quebec Pension Plan and the Canada Pension Plan, unemployment insurance, family allowances, federal tax credits for children and other income from public sources.

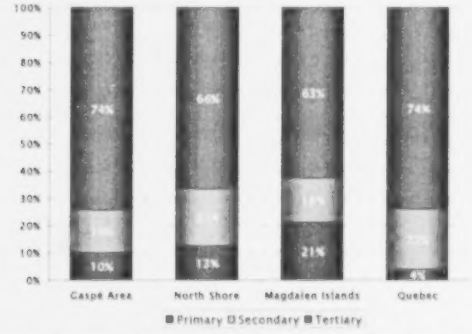
23% while this proportion reaches 35% in the secondary sector. In comparison, this same proportion reaches 14% for the population of the Gaspé Area and 8% for Quebec.

Unemployment insurance is a major component of the government transfer payments in the fishing industry since it makes up 74% of the transfer payments made to the population working in the secondary sector. This proportion reaches 84% for the population working in the primary sector in the Gaspé Area.

1.5. Sectors of Activity

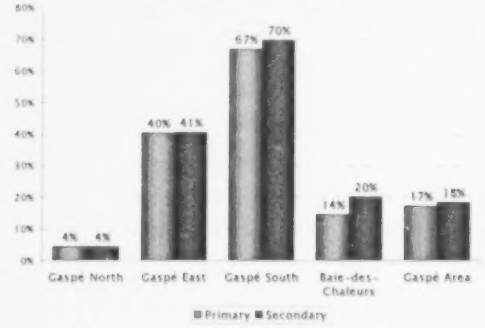
In the Gaspé Area, the primary sector accounts for 10% of all jobs, which is more than two and a half times the proportion for Quebec. The logging industry and fishing activities make up the majority of the primary sector. The secondary sector in the Gaspé Area generates a smaller proportion of jobs than the secondary sectors of the other maritime sectors and Quebec. Also, the number of jobs generated by the service sector are similar to those generated in Quebec, but are higher than in the other maritime sectors.

Graph 11: Distribution of the Active Population, According to Sectors of Economic Activity and Maritime Sector, 2001



Source: Statistics Canada, 2001 Census, special compilations

Graph 12: Proportion of the Population Aged 15 Years and Older in the Primary and Secondary Sectors of the Fishing Industry in the Gaspé Area, 2001



Source: Statistics Canada, 2001 Census, special compilations

The fishing industry is a major component of the Gaspé Area's economy since 17% of the population aged 15 and older is associated with the primary sector of this industry. For the secondary sector, this proportion is 18%. Marked differences can be observed among the different sub-sectors in the Gaspé Area. Gaspé South is the most dependent on the fishing industry since a significant proportion of the population aged 15 and older and working in the primary sector is associated with this industry. For the secondary sector, this proportion is 70%. Gaspé East ranks second in this category since a significant proportion of the population aged 15 and older and working in the primary sector is also associated with the fishing industry.

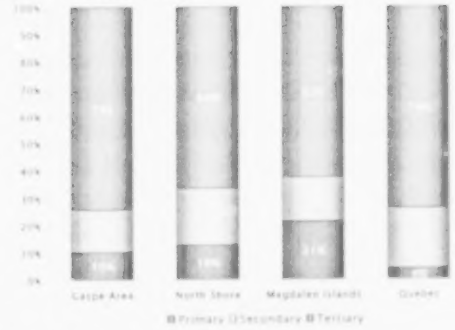
23% while this proportion reaches 35% in the secondary sector. In comparison, this same proportion reaches 14% for the population of the Gaspé Area and 8% for Quebec.

Unemployment insurance is a major component of the government transfer payments in the fishing industry since it makes up 74% of the transfer payments made to the population working in the secondary sector. This proportion reaches 84% for the population working in the primary sector in the Gaspé Area.

1.5. Sectors of Activity

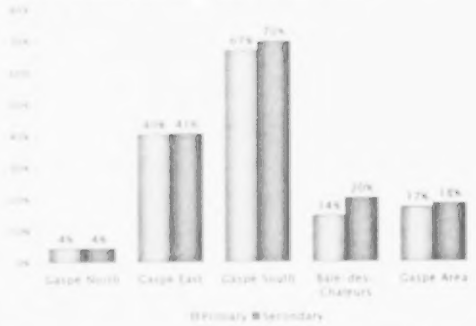
In the Gaspé Area, the primary sector accounts for 10% of all jobs, which is more than two and a half times the proportion for Quebec. The logging industry and fishing activities make up the majority of the primary sector. The secondary sector in the Gaspé Area generates a smaller proportion of jobs than the secondary sectors of the other maritime sectors and Quebec. Also, the number of jobs generated by the service sector are similar to those generated in Quebec, but are higher than in the other maritime sectors.

Graph 11: Distribution of the Active Population, According to Sectors of Economic Activity and Maritime Sector, 2001



Source: Statistics Canada, 2001 Census, special compilations

Graph 12: Proportion of the Population Aged 15 Years and Older in the Primary and Secondary Sectors of the Fishing Industry in the Gaspe Area, 2001



Source: Statistics Canada, 2001 Census, special compilations

The fishing industry is a major component of the Gaspé Area's economy since 17% of the population aged 15 and older is associated with the primary sector of this industry. For the secondary sector, this proportion is 18%. Marked differences can be observed among the different sub-sectors in the Gaspé Area. Gaspé South is the most dependent on the fishing industry since a significant proportion of the population aged 15 and older and working in the primary sector is associated with this industry. For the secondary sector, this proportion is 70%. Gaspé East ranks second in this category since a significant proportion of the population aged 15 and older and working in the primary sector is also associated with the fishing industry.

In Quebec, 8 200 people were working in the primary sector of the fishing industry and the marine product processing sector in 2001. Moreover, 90% of these workers were in the maritime sectors of the Gaspé Area (43%), North-Shore (24%) and Magdalen Islands (23%), for a total of 7 300 people.

In the Gaspé Area, more than 3 500 people were working in the fishing industry in 2001. The maritime sub-sector of Gaspé South had the most people working in the fishing industry, with nearly 50% of the total number for the Gaspé Area and more than 20% of the total number for Quebec.

Table 1: Population of Individuals Aged 15 Years and Older in the Fishing Industry in Quebec and the Maritime Sectors, 2001

	North Shore	Magdalen Islands	the Gaspé Area	Gaspé North	Gaspé East	Gaspé South	Baie-des-Chaleurs	Elsewhere in Quebec	Quebec
Primary sector	965	1 020	1 620	235	280	830	280	245	3 850
Secondary sector	1 020	755	1 925	290	435	930	275	660	4 360
Total	1 985	1 775	3 545	525	715	1 760	555	905	8 210

Source: Statistics Canada, 2001 Census, special compilations
Note: The totals may not add up to 100% due to rounding, or for Quebec, according to the census' type of questionnaires (long or short), in which relative data weight may slightly affect the total.

1.6. Labour Market Indicators for the Gaspé Area-Magdalen Islands[6] Region

Special Collaboration with
Human Resources and Skills Development Canada

In 2001-2003, the regional labour market of the Gaspé Area-Magdalen Islands experienced a strong growth with an average of 750 new jobs each year. Helped by a decline in the population aged 15 and older, the employment rate jumped four percent to nearly 45%. The strength of the economy was felt mostly in 2002 and 2003. The year 2001 posted weaker job results than 2002.

Positive economic developments have probably encouraged people to re-enter the labour market. Between 2001 and 2003, the regional labour market saw its active population increase by 500 people each year. Since the growth of the participation rate increased less rapidly than the rise in the number of jobs, the unemployed population experienced a corresponding decline of more than 250 people per year. The unemployment rate dropped significantly to 17.7% in 2003.

Owing to the region's demographic context, the working age population (aged 15 and older) has declined about 0.7% per year since 2001. According to Statistics Canada's estimates, there were 81 900 people aged 15 and older in the Gaspé Area-Magdalen Islands region. Data from the last Canadian census (2001) stated a decline of 8 250 people between 1996 and 2001. The population aged 15 and older posted a decline of 4 425 people. Low birth rates for the last 20 years and the exodus of the population have caused a decline in the region's working age population.

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[6] This section presents recent data on the labour market. It was prepared by Human Resources and Skills Development Canada (HRSDC) using data from Statistics Canada's Labour Force Survey. Statistics Canada publishes an estimation of the main labour market indicators every month based on economic region, using the results of the Labour Force Survey (LFS). These regions are generally made up of several census divisions within a province. In Quebec, the census divisions correspond to the territorial limits of regional county municipalities (RCM). It is the only source of monthly and annual estimations of the activity on the intra-provincial labour market.

The Gaspé-Magdalen Islands economic region is a vast 20 400 square kilometer peninsula pointing into the Gulf of the St. Lawrence, in Quebec's southeastern-most sector. It is also the Magdalen Islands Archipelago located 200 km from the coasts of Gaspé. The peninsula includes the limits of the following five regional county municipalities (RCM): Haute-Gaspésie (from Cap-Chat to Sainte-Madeleine-de-la-Rivière-Madeleine), Côte-de-Gaspé, Rocher-Percé, Bonaventure and Avignon. The Magdalen Archipelago corresponds to the RCM of the Magdalen Islands. At the time of the 2001 census, the region was home to 96 924 people.

From 2001 to 2003, the active population increased slightly. Thus, an extra 1 500 people participated in the labour market, which represented an average increase of 500 people per year. However, this increase happened for the most part in 2001 and 2002. The active population remained the same in 2003 at 44 600 people. We observe that since 1987, the number of people making up the active population never exceeded 44 600.

Table 2: Main Labour Market Indicators for Gaspé Area-Magdalen Islands, 2001-2003

	Gaspé Area-Magdalen Islands				Quebec				Gaspé Area-Magdalen Islands /Quebec
	2001	2002	2003	2001-2003	2001	2002	2003	2001-2003	2001-2003
Population aged 15 years and older ('000)	83.2	82.5	81.9	82.5	5 984.5	6 033.3	6 083.5	6 033.8	1.4%
Active population ('000)	42.2	44.6	44.6	43.8	3 806.9	3 930.2	4 016.5	3 917.9	1.1%
Employed ('000)	33.7	35.2	36.8	35.2	3 474.5	3 593.1	3 649.9	3 572.5	1.0%
Unemployed ('000)	8.5	9.4	7.8	8.6	332.3	337.1	366.6	345.4	2.5%
Participation rate (%)	50.7	54.0	54.5	53.1	63.6	65.1	66.0	64.9	
Employment rate (%)	40.5	42.6	44.9	42.7	58.1	59.6	60.0	59.2	
Unemployment rate (%)	20.3	21.2	17.7	19.6	8.7	8.6	9.1	8.8	

Sources: Statistics Canada, Labour Force Survey and compilation from Human Resources and Skills Development Canada (HRSDC).

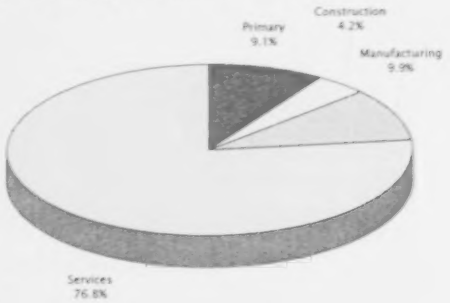
In 2003, the participation rate increased to 54.5%, its highest level since 1987. This strong participation rate is mostly attributable to a decline in the working age population instead of a substantial increase in the active population, however. For example, 2002 and 2003 posted the same number, for the active population, but the participation rate was higher in 2003 due to a decline in the population aged 15 and older. The region's participation rate is still the lowest of all Quebec's economic regions.

In the Gaspé Area and the Magdalen Islands, the number of employed people has increased significantly since 2001. An average of 750 jobs were created each year, which represented a growth rate of 2.2% per year. This growth rate is slightly higher than its counterpart in Quebec (2%). The region's economy has benefited from Quebec's positive economic conditions in 2002 and 2003. On the other hand, the beginning of the three-year period was not as outstanding. In fact, the labour market posted a loss of 800 jobs in 2001. However, 2002 and 2003 posted an average gain of 1 600 jobs (4.5%). The average of 35 200 jobs for the last three years is higher than the average of 33 500 for the three-year period that ended in 2000. Job growth was almost exclusively in the full-time employment sector. The region created an average of 900 full-time jobs per year between 2001 and 2003 (+3%). For the same period, the part-time job sector posted a loss of nearly 100 jobs per year (1.5%).

We observe, however, that the region has some catching-up to do if it wants to reach its proportion for employment. With less than 1.4% of the working age population in Quebec, the region accounts for only 1.1% of the labour market in Quebec. It must be noted that since the existence of this data, the region has always had a slightly lower number of job gains compared with that of the population of Quebec.

For the Gaspé Area-Magdalen Islands region, the employment rate peaked at 44.9% in 2003, which represented 4.5 out of 10 people of the working age population. This rate is far below the rate for Quebec. The province of Quebec posted an employment rate of 60% in 2003. The small number of employed people is partly attributable to the seasonality of the labour market. In fact, the employment rate is slightly higher than 40% during the low season and higher than 51% during the high season. In Quebec, the variation between the minimum and maximum employment rates is close to 4 times smaller (58.6 and 61.5).

Graph 13: Distribution of Employment in 2001-2003, Gaspé Area-Magdalen Islands



Source: Statistics Canada, Labour Force Survey

The primary sector makes up a significant portion (9.1%) of the total employment for the Gaspé Area-Magdalen Islands region. This percentage is three times higher than the percentage in Quebec, which is slightly under 3%. Close to 80% of the 3 200 jobs in this sector are in two sub-sectors: fishing activities and the logging industry. Agriculture and mining are marginal with about 500 and 200 jobs respectively. Due to the prevalence of seasonality, the primary sector's labour market fluctuates according to the period of the year. In fact, during the high season, the primary sector can represent close to 13% of the employment (July) while it can represent slightly more than 6% during the low season (January).

During the 1990s, the primary sector portion of the job market experienced small fluctuations. Its significance in terms of the number of jobs and relative proportion started to decline in 1996. We have observed a slight increase in the last two years.

Table 3: Distribution of Employment among Industrial Groupings, Gaspé Area-Magdalen-Islands

Industries	Average employment level 2001-2003	Relative job share for the region	Relative job share for Quebec
All industries	35 200	100.0%	100.0%
Primary	3 200	9.1%	2.8%
Construction	1 500	4.2%	4.3%
Manufacturing	3 500	9.8%	18.1%
Services	27 100	76.9%	74.8%
Consumer services	10 900	30.9%	27.6%
Production services	4 900	14.0%	23.4%
Public and parapublic services	11 300	32.0%	23.8%

Sources: Statistics Canada, Labour Force Survey and compilation from Human Resources and Skills Development Canada (HRSDC).
Note: The average employment level represents the average annual employment level.

The manufacturing sector accounted for 9.8% of regional employment compared with 18.1% for Quebec. Activity was mostly concentrated in sub-sectors associated with the exploitation of natural resources: forests and ocean. Approximately 3 500 people were working in this sector. The fish and seafood processing industries as well as the wood product manufacturing and paper industries employed more than 85% of the labour force in the manufacturing sector. Certain sub-sectors are in the development phase, but their contribution to job growth remains marginal.

Since the past decade, the manufacturing sector has suffered from the closing of many large businesses employing a significant number of people. Employment in the manufacturing sector has posted a slight growth over the recent period. The depletion of natural resources (wood and groundfish) and the recent closings of significant businesses in the region (Gaspésia and Noranda) drove the population to take their future into their own hands and to not hope for investments from multinational corporations. Due to competitiveness, limited opportunities for expansion of the domestic market and the depletion of natural resources, job growth will depend upon the capacity of regional businesses to:

- Maintain and expand their presence in foreign markets,
- Offer original and innovative products,
- Develop secondary and tertiary processing activities.

The emergence of an industrial sector related to wind energy (components manufacturing: towers, blades and nacelles) is regarded by many regional players to be an opportunity for the region to develop a key manufacturing sector which would not be related to the exploitation of the region's natural resources and which would create specialized, permanent and well-paying jobs.

The position of the service sector in the region's economic structure reaches a significantly more important level than in Quebec. Approximately 27 100 people were working in this sector, which represented approximately 77% of the labour force (74.8% for Quebec). During the last three years, the service sector has posted slight gains. Certain sub-sectors posted notable gains, others posted losses. In total, the sector gained 1 200 jobs.

Industrial activities related to the service sector can be divided into three large sectors according to the recipient of the services: consumer services[7], production services, and public and parapublic services[8]. The production services[9] are the less significant for the region with 4 900 jobs. During the last three years, employment in this sector remained stable. However, we observe a shift toward corporate management activities, administrative support and professional and technical services to the detriment of wholesale trade, transportation, finance, insurance and real estate activities. With a relative part of 14%, the latter activities are significantly lower than their level in Quebec (23.4%).

For the region, 10 900 people were working in the consumer service sector. Due to the dependence of these workers on the tourism industry, a significant portion of these jobs are seasonal. This sector has experienced a notable growth over the last few years.

Public and parapublic services provide jobs for 11 300 people. With 32% of total employment, these sectors stand stronger in this region than in Quebec with 24%. Activities related to health care and social assistance make up a significant part of this sector with close to 20% of the regional employment compared with slightly above 12% for Quebec. Health care and social assistance sectors have posted job gains in the last three years. Education and public administration sectors have mostly posted losses.

[7] Wholesale and retail trade, lodging and food services, culture and recreation, personal and various services

[8] Education, social and health services and public administration

[9] Transportation and storage, public utilities, finance, insurance, real estate and business services

1.7. Labour Market Indicators for the Lower St. Lawrence Region[10]

Special Collaboration with
Human Resources and Skills Development Canada

Employment in the Lower St. Lawrence region improved in 2003 after the year 2002 brought its share of employment losses. Lower St. Lawrence's labour market rarely posted two consecutive years of growth. Thus, the employment level nearly returned to its 2001 level, when it reached its historical high of 52.6%.

Table 4 presents the main labour market indicators for the last three years as well as an average of these three years for the Lower St. Lawrence region and Quebec. On one hand, the working age population is declining, which mirrors regional demographic trends and is due to a low birth rate and the exodus of the population, particularly among the 18-24 group. Hence, the working age population posted an average loss of 0.4% from 2001 to 2003 while this indicator for Quebec grew 0.8%. This is a critical point since a close relationship exists between population growth and job creation.

In 2003, 97 800 people made up the active population. This amount is slightly lower than the 2001 level of 99 300 people, but is clearly gaining ground compared with the 2002 level (92 600). For Quebec, the active population posted an average annual growth of 2.8% from 2001 to 2003. For the 2001-2003 period, the active population averaged 96 600, which represented a gain of 3 300 people, or an average annual growth of 1 100 (+1.1%), compared with the last three-year period (1998-2000). In comparison, the active population of Quebec posted an average growth of 1.9% during the same period. For the 2001-2003 period, the proportion of the regional active population for Quebec was 2.46%, less than the population aged 15 and over (2.78%). Poor participation in the labour market

[10] This section presents recent data on the labour market. It was prepared by Human Resources and Skills Development Canada (HRSDC) using data from Statistics Canada's Labour Force Survey. Statistics Canada publishes an estimation of the main labour market indicators every month based on economic region, using the results of the Labour Force Survey (LFS). These regions are generally made up of several census divisions within a province. In Quebec, the census divisions correspond to the territorial limits of regional county municipalities (RCM). It is the only source of monthly and annual estimations of the activity on the intra-provincial labour market.

The 200 630 people who live in Lower St. Lawrence reside in 128 municipalities, cities or villages (2001 Census) that are divided into eight regional county municipalities (RCM): Kamouraska, Témiscouata, Rivière-du-Loup, Les Basques, Rimouski-Neigette, La Mitis, La Matapedia and Matane. The inhabited areas cover the lowlands of the St. Lawrence, climb up the foothills of the Appalachian Plain and penetrate deeply into the Témiscouata and Matapedia valleys. There are urban areas throughout the territory, with each RCM boasting a major service centre. Among these centers are Rimouski (31 305 people), Rivière-du-Loup (17 772 people), Matane (11 635 people), Amqui (6 473 people), Mont-Joli (5 886 people) and La Pocatière (4 518 people).

explains this situation. In fact, the participation rate was 57.5% in 2001-2003 and 64.9% for Quebec. Compared with the period 1998-2000, the regional participation rate increased from 55.5% to 57.5%, a two-point gain. For Quebec, the participation rate also gained two percent.

Table 4: Main Labour Market Indicators for Lower St. Lawrence, 2001-2003

	Lower St. Lawrence				Quebec				Lower St. Lawrence / Quebec
	2001	2002	2003	2001-2003	2001	2002	2003	2001-2003	2001-2003
Population aged 15 years and older ('000)	168.5	167.9	167.2	167.9	5 984.5	6 033.3	6 083.5	6 033.8	2.78%
Active population ('000)	99.3	92.6	97.8	96.6	3 806.9	3 930.2	4 016.5	3 917.9	2.46%
Employed ('000)	88.4	82.7	87.9	86.3	3 474.5	3 593.1	3 649.9	3 572.5	2.42%
Unemployed ('000)	10.9	9.9	9.9	10.2	332.3	337.1	366.6	345.4	2.96%
Participation rate (%)	58.9	55.1	58.5	57.5	63.6	65.1	66.0	64.9	
Employment rate (%)	52.5	49.3	52.6	51.4	58.1	59.6	60.0	59.2	
Unemployment rate (%)	11.0	10.7	10.1	10.6	8.7	8.6	9.1	8.8	

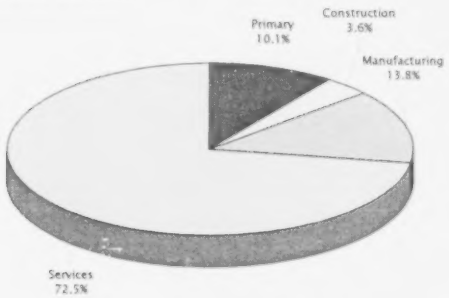
Sources: Statistics Canada, Labour Force Survey and compilation from Human Resources and Skills Development Canada (HRSDC).

After a poor year in 2002, employment caught up in 2003 and brought its level to 87 900, which represented about 500 less jobs than in 2001. For the 2001-2003 period, employment averaged 86 300 people despite the poor results posted in 2002, which represented a gain of 3 500 jobs over the last three-year period — an annual gain of close to 1 200 (1.4%). The region's labour market offered a solid performance during the last three years even though this growth rate was lower than its counterpart in Quebec (+2.1%). In fact, we must take into account the population variation that is increasing for Quebec but is declining for Lower St. Lawrence. Thus, the employment rate went from 49.3% in 1998-2000 to 51.4% in 2001-2003, a gain of 2.1 percent. During this time, the employment rate for Quebec increased from 57% to 59.2%, a gain of 2.2 percent, which is very similar to the Lower St. Lawrence region. The evolution of the employment rate shows that the 7.7 percent difference between Lower St. Lawrence and Quebec in 1998-2000 remained basically the same in 2003-2004 at 7.8 percent.

As for unemployment, it appears to follow a downward trend since the unemployment rate posted in 2003 its lowest level in history with 10.1%. The regional unemployment rate for 2001-2003 averaged 10.6% compared with 11.3% for the last period. As for Quebec, the unemployment rate for 2001-2003 went from 9.3% to 8.8%, despite a level of 9.1% for

2003. Despite the downward trend of the unemployment rate for the region, it remains close to 20% higher than the rate for Quebec.

Graph 14: Distribution of Employment in 2001-2003, Lower St. Lawrence



Source: Statistics Canada, Labour Force Survey

Even though the Lower St. Lawrence's economy has seen its service sector grow significantly during the last decade, it is still strongly dependent on its natural resources and their transformation. Thus, the region had some 8 700 jobs in the primary sector for 2001-2003, which represented 10.1% of the total employed population. This sector was only making up 2.8% of the total employment for Quebec. After the primary sector lost relative importance during the 1990s, it grew vigorously in 2001-2003 and increased its relative weight in the economy at more than 10%.

The construction sector has employment levels that fluctuate greatly from year to year. In 2001-2003, the employment level posted an annual loss of 3% to 3 100 jobs, which represented 3.6% of the total employment compared with 4.3% for Quebec.

Table 5: Distribution of Employment among Certain Industrial Groupings, Lower St. Lawrence

Industries	Average employment level 2001-2003	Relative job share the region	Relative job share for Quebec
All industries	86 300	100.0%	100.0%
Primary	8 700	10.1%	2.8%
Construction	3 100	3.6%	4.3%
Manufacturing	11 900	13.8%	18.1%
Manufacturing related to consumers	4 000	4.6%	7.3%
Manufacturing related to resources	5 300	6.1%	4.1%
Manufacturing related to investments	2 600	3.0%	6.8%
Services	62 600	72.5%	74.8%
Consumer services	25 600	29.7%	27.6%
Production services	14 100	16.3%	23.4%
Public and parapublic services	22 900	26.5%	23.8%

Sources: Statistics Canada, Labour Force Survey and compilation from Human Resources and Skills Development Canada (HRSDC).

The Lower St. Lawrence's manufacturing sector is relatively well diversified. It is composed mostly of small and medium businesses, which contrasts with many other natural resource sectors where large businesses (aluminum, pulp and paper) dominate. Employment in the manufacturing sector posted a strong growth in 2001-2003, averaging 3.6%, especially in manufacturing related to investments (+17.6%). This growth allowed employment to reach 11 900, which represented 13.8% of the total employment. Despite the progress made, the relative weight of the regional manufacturing industry remains below its counterpart in Quebec (18.1%). In dissecting the manufacturing sector, we observe that the manufacturing sub-sector related to resources (wood, paper, etc.) employs the greatest number of people with 5 300, which represented 6.1% of the total employment compared with 4.1% for Quebec. The manufacturing industries related to consumers (food, textiles, clothing, furniture, etc.) and manufacturing related to investments (chemical products, machinery, metals, transportation equipment, electric and electronic materials) employs 4 000 (4.6%) and 2 600 people (3%), respectively. For Quebec, these proportions are respectively 7.3% and 6.8% of the total employment, which is more significant than in the Lower St. Lawrence region.

In 2001-2003, the large service sector employed some 62 600 people, which represented 72.5% of the total employment. This proportion is slightly below the average for Quebec (74.8%). While the primary sector and the manufacturing industries were experiencing a strong growth during the last three years, the service sector posted a small gain of 0.3 % in employment, which amounts for barely 200 jobs annually. This could be an early warning about the impact of the demographic trend on the regional economy, and more especially, in the consumer services and the public and parapublic services which directly serve the local population.

Services can be divided into three large sub-sectors: consumer services, production services and public and parapublic services. In the Lower St. Lawrence region, consumer services employ the most workers with 25 600, which represented 29.7% of the total employment. In 2001-2003, consumer services posted an annual growth of 0.4%. Public and parapublic services employ 22 900 people (26.5%), and services for production employ 14 100, which represented 16.3% of the total employment compared with 23.4% for Quebec. Production services stalled in 2001-2003 after having posted a strong growth in the 1990s.

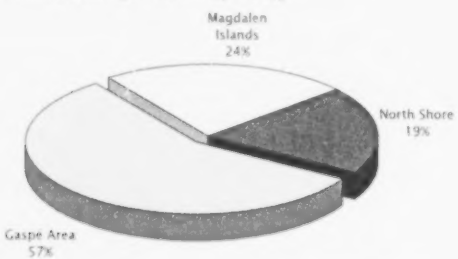
2. The Fishing Industry in the Gaspé Area: An Overview

2.1. Marine Fisheries

2.1.1. Evolution of Landings

The Gaspé Area is the region in Quebec with the most significant commercial fishery landings. In 2003, landings in the Gaspé Area were 32 000 t for a value of close to $85 million, which represented more than half of the total landings in terms of value and volume for Quebec. Also, even if mariculture[11] does not hold the same footing as marine fisheries, this industry is being developed in the Gaspé Area. In 2003, 24 licences were issued to 14 businesses which operated in an area of approximately 3 000 hectares. Mariculture employs about 20 people, of which half are seasonal workers. Mussels (M. edulis and M. trossolus) make up the most part of the mariculture production in the Gaspé Area.

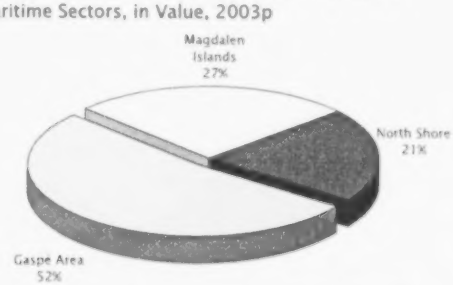
Graph 15: Distribution of Landings in Quebec's Maritime Sectors, in Volume, 2003p



Volume of Landings in Quebec: 56 630 t

Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Graph 16: Distributions of Landings in Quebec's Maritime Sectors, in Value, 2003p



Value of Landings in Quebec: 163 M$

Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

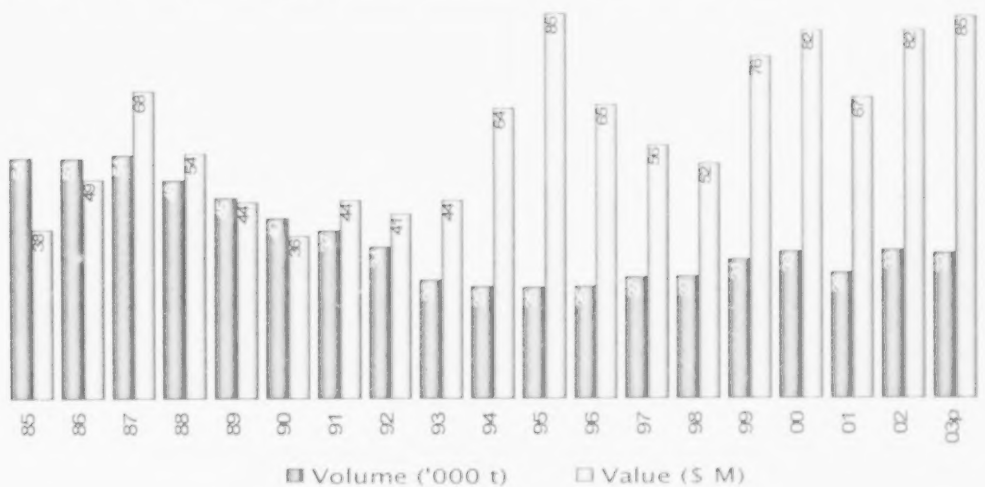
[11] Mariculture: saltwater aquaculture. The publication of the data on mariculture for Gaspé maritime sector is limited due to data confidentiality. In fact, few businesses are working in this area of economic activity in Gaspé (six businesses). A more exhaustive analysis of Quebec's aquaculture industry is available in this publication: *The Fishing Industry in Québec, Socio-Economic Profile, 2004.*

In 2003, 55 ports in the Gaspé Area were used for commercial landings. The most important ports in terms of volume are Rivière-au-Renard, Sainte-Thérèse-de-Gaspé and Grande-Rivière. The most important ports in terms of value are Rivière-au-Renard, Sainte-Thérèse-de-Gaspé and Rimouski-East.

For Quebec, the Port of Rivière-au-Renard ranks first in terms of volume and value with total landings of 14 100 t worth $22.7 million. Shrimp landings make up more than 90% of the activities in this port. The Port of Sainte-Thérèse-de-Gaspé makes a good showing in Quebec and ranks second in value and fourth in volume with landings of 2 700 t for a value of $12 million, mostly due to snow crab landings.

In comparison with ports in Atlantic Canada, the Port of Rivière-au-Renard ranked 9th in value and 16th in volume in 2002.

Graph 17: Evolution of Landings in the Fishing Industry, Gaspé Area, 1985-2003p



Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Landed value posted a significant increase during the last five years in the Gaspé Area. The value is now higher than the historical average posted since 1985. The year 2003 is actually the second best year ever. In fact, only the landed value posted in 1995 is higher than the average of the last four years with $85.4 million. The high value of crustaceans, especially snow crab and lobster, allowed the region's commercial fishery activities to

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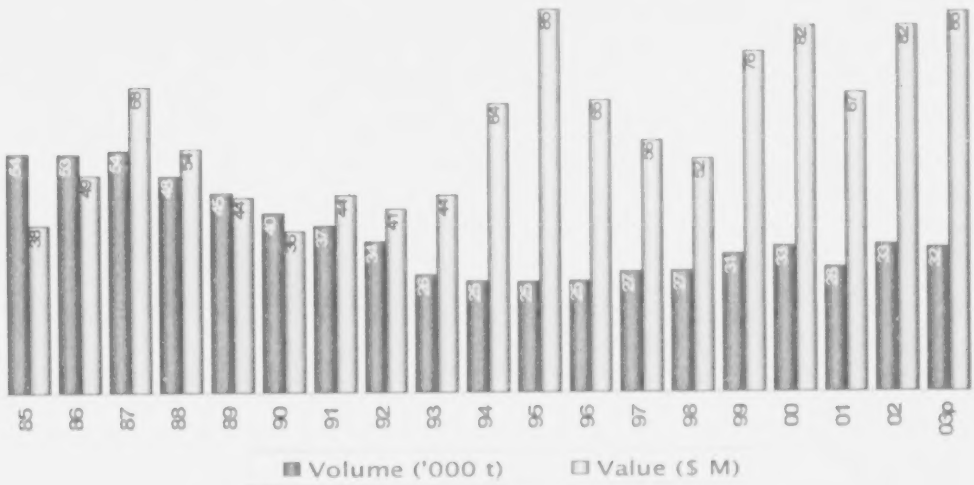

Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

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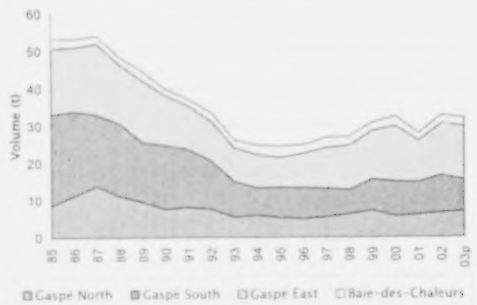
record better results than the period before the meltdown of the groundfish stocks at the beginning of the 1990s.

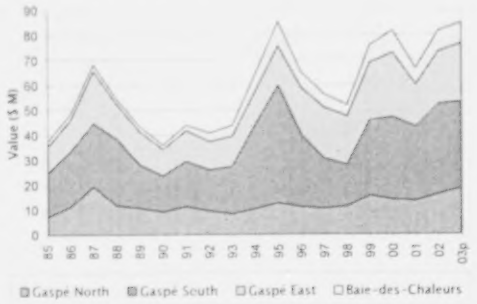
As for landed volumes, we observe that they have become smaller with the first moratoriums of the 1990s. Since these moratoriums, a certain stability and even a slight growth can be seen in the landed volumes. This growth is partly attributable to the Gulf's shrimp quotas that are now at record levels.

Graph 18: Evolution of Landings in the Gaspé Area by Sub-Sector, in Volume, 1985-2003



Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Graph 19: Evolution of Landings in the Gaspé Area by Sub-Sector, in Value, 1985-2003



Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

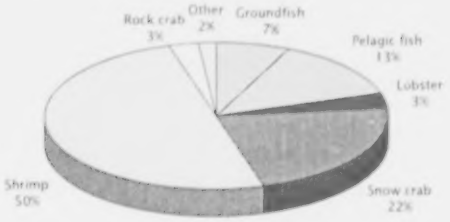
Gaspé South is the most important sub-sector in the Gaspé Area according to the commercial fishing value, mostly because of snow crab landings, which represent close to two-thirds of the region's landings. In 2003, landings for Gaspé South accounted for more than 40% of the total landed value for the Gaspé Area. Gaspé East follows with 28%, Gaspé North with 22% and Baie-des-Chaleurs with 10%.

As for landed volumes, Gaspé East topped the list in 2003 with 45% of the total landings in the Gaspé Area, mostly due to shrimp landings. The sub-sector of Gaspé South follows with 26%, Gaspé North with 22% and finally Baie-des-Chaleurs with 7%.

2.1.2. Species Landed

In 2003, crustaceans represented a significant part of the commercial fishing activities for the Gaspé Area with 78% of the landed volumes and more than 92% of the total landed value. Landed value for snow crab totalled close to $42 million. Shrimp comes next with a landed value of more than $21 million. As the third species in importance and the main activity for more than 200 fishermen, lobster had a landed value of $14.6 million in 2003.

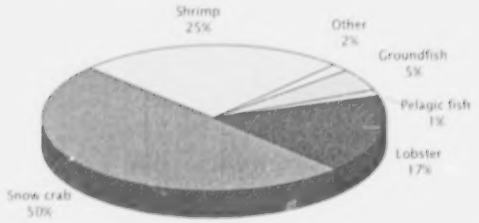
Graph 20: Breakdown of Species Landed, in Volume, Gaspé Area, 2003p



Total Volume of Landings: 32 037 t

Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Graph 21: Breakdown of Species Landed, in Value, Gaspé Area, 2003p



Total Value of Landings: 84,8 M$

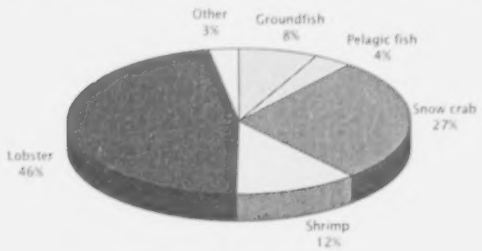
Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Groundfish represented 7% of the landings in the Gaspé Area in 2003. Landed groundfish consist mostly of Greenland halibut and are for the most part accounted for in the sub-sector of Gaspé North.

2.1.3. Workforce

In 2003, 436 fishing businesses were operating in the Gaspé Area. The importance of crustaceans is again outlined in this situation. In fact, 375 businesses were mostly fishing for crustaceans in 2003. Of this number, 205 businesses were operating mostly in lobster fishing, which represented nearly half of the businesses in this region. Also, 119 businesses were active mostly in snow crab fishing and 51 in shrimp fishing.

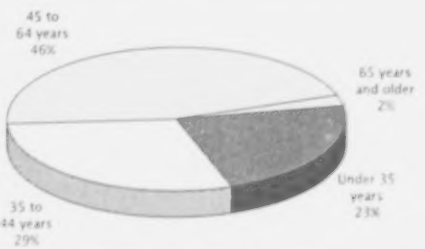
Graph 22: Distribution of Fishing Businesses According to Main Species Landed, Gaspé Area, 2003p



436 fishing businesses

Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Graph 23: Distribution of Fishermen and Fisherman's Helpers According to Age, Gaspé Area, 2003p



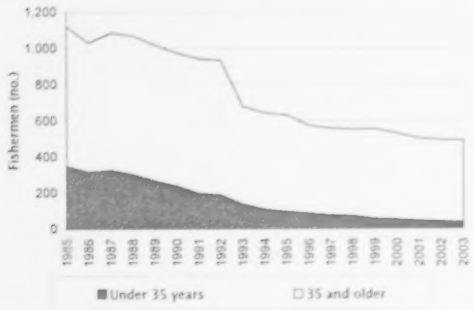
Fishermen and fisherman's helpers in Gaspé Area: 1 457

Sources: Statistical Services, DFO, Quebec Region for fishermen and BAPAP for fisherman's helpers
Compilation: DRPE, DFO, Quebec Region

As for groundfish fishing, 33 businesses were active in this sector in 2003, and 16 were active in pelagic species fishing. The 2003 moratorium on cod fishing has pushed some groundfish fishermen to redirect their activity toward other species.

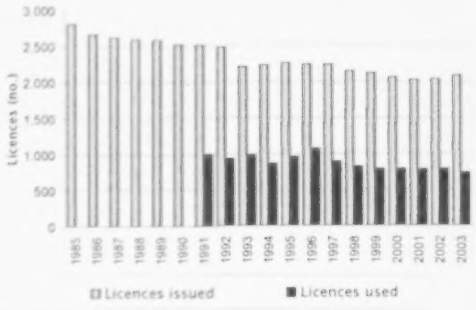
In 2003, the Gaspé Area was home to close to 1 500 fishermen and fisherman's helpers. Nearly half (46%) of them were between 45 and 64 years of age, 29% between 35 and 44 and 23% less than 35 years of age. The age distribution of fishermen and fisherman's helpers in the Gaspé Area is comparable to the distribution elsewhere in Quebec.

Graph 24: Evolution of the Number of Fishermen According to Age, Gaspé Area, 1985-2003p



Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Graph 25: Evolution of the Number of Licences According to Status, Gaspé Area, 1985-2003p



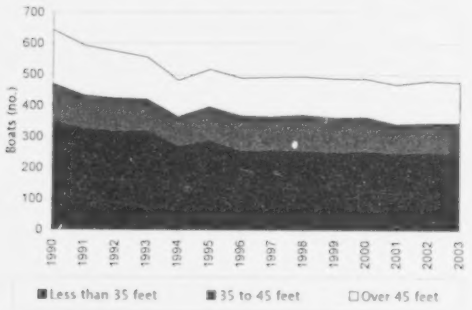
Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region
Note: Data on active licences is not available for the period before 1991.

Since 1985, the number of fishermen[12] in the Gaspé Area dropped by more than half to slightly less than 500 in 2003. During this period, the number of licences issued decreased 26% to nearly 2 100 licences in 2003. Therefore, the number of licences held by each fisherman went from 2.5 in 1985 to 4.3 in 2003.

A significant part of the licences held by fishermen usually remain inactive. In fact, only 35% of the licences have been used in 2003 and this level has been relatively constant since the beginning of the 1990s.

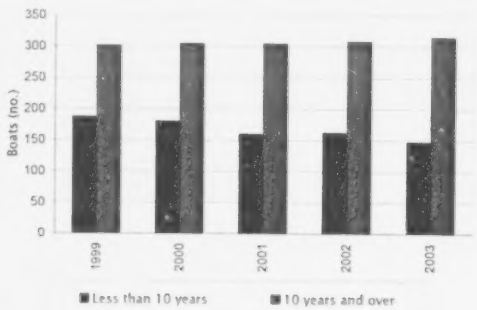
[12] The number of fishermen corresponds to the number of fishermen registered with the DFO. Not all of these fishermen are necessarily active.

Graph 26: Evolution of the Number of Active Fishing Boats According to Size, Gaspé Area, 1990-2003p



Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Graph 27: Evolution of the Number of Active Fishing Boats According to Age, Gaspé Area, 1999-2003p



Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Since 1994, we note that the number of active boats has stabilized around 500 boats. Boat distribution in terms of size has also stabilized during this period. Before 1994, the number of boats less than 35 feet in length was the only category that decreased significantly while the number for the two other categories decreased slightly. In 2003, half of the boats were less than 35 feet in length, slightly more than 20% were between 35 and 45 feet in length, and boats more than 45 feet in length made up slightly less than 30% of all the boats in the Gaspé Area.

As for boat distribution by age, we note a slightly aging but nearly constant trend among the fleet of fishing boats in the Gaspé Area since 1999. In 2003, close to 70% of the fishing boats were more than 10 years old. This aging trend may be less important than what is shown by the statistics since major repairs can be made to boats in order to extend their operating life. In this case, the boats are still considered old according to the statistics despite their renovations.

2.1.4. First Nations of the Gaspé Area

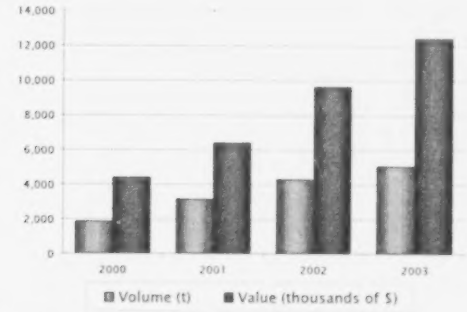
In 2003, four First Nations were active in the commercial fishing sector in the Gaspé Area: the Micmacs of Gesgapegiag, the Micmacs of Gespeg, the Micmacs of Listuguj and the Malecites of Viger.

After the Marshall decision and since 2000, the commercial fishing activities of the First Nations have progressed rapidly. At this point, the main fishing activity was shrimp with landings of more than 1 350 t and fishing revenues of close to $2.1 million. The other fishing activities were snow crab and, on a lesser scale, rock crab and lobster. In 2000, total landings for the First Nations were approximately 1 800 t for a value of $4.4 million.

In 2001, shrimp landings increased 70% to 2 300 t, while snow crab landings increased 75% to 700 t. This growth in the landings allowed the First Nations in the Gaspé Area to increase their fishing revenues 45% to $6.4 million.

In 2003, the First Nations in the Gaspé Area were using 27 boats to exploit their commercial fishing licences and were employing more than 110 fishermen and fisherman's helpers.

Graph 28: Evolution of Landings by First Nations in the Gaspé Area, 2000-2003p



Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

During the year 2002, shrimp and snow crab landings posted gains of 30% and 49%, respectively. The main landed species in terms of volume remained shrimp (69%), snow crab (24%), rock crab (6%) and lobster (1%). In terms of value, snow crab was the main landed species in 2002 ($5.3 M) followed by shrimp ($3.8 M).

The 2003 results followed this trend with an increase of more than 20% of the landed volume to 5 000 t and more than 35% of the landed value to $12.4 million. Snow crab landings totalled $7 million and shrimp landings totalled $4.7 million. On a lesser scale, lobster landings were still important for these communities with a total landed value of more than $400 K.

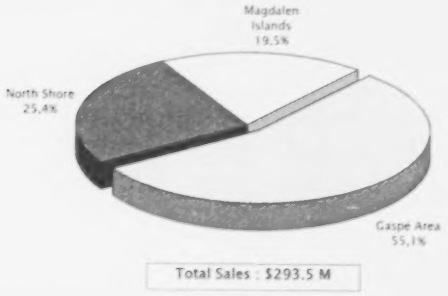
2.2. Processing of Fishery Resources

2.2.1. Evolution of Sales

The processing[13] industry in the Gaspé Area consists of about sixty businesses that usually purchase fish and seafood directly from the fishermen and then export or sell them on the local market. Most of these businesses process their products once (freezing, salting, cooking, packaging, etc.) before selling them. In 2002, these businesses purchased $77.5 million worth of fish and seafood and sold it for $161.7 million, which represented 55.1% of the total for the maritime sectors in Quebec.

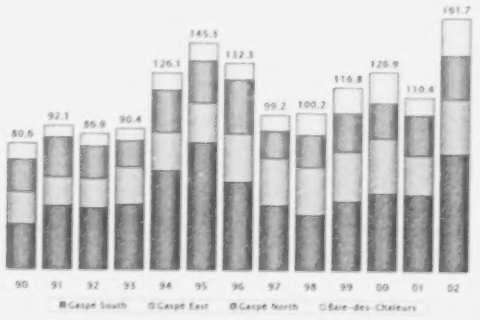
The sale of marine products in the Gaspé Area experienced great fluctuations for the last twelve years. In fact, after sales nearly doubled between 1990 and 1995, from $80.6 million to $145.3 million, they were $99.2 million in 1997 and then reached an historical record of $161.7 million in 2002. The sale of snow crab explains most of these fluctuations. Snow crab production fluctuated between $15 million and $72 million during these years. In the meantime, sales of other species relatively stalled. We note however that the production of herring posted high results in 2002 with sales of $15 million; an impressive result considering the fact that sales for this species has never exceeded $4 million for the last 20 years.

Graph 29: Distribution of the Sale of Marine Products in the Maritime Sectors of Quebec, 2002



Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Graph 30: Evolution of Sales for Processing Businesses in the Gaspé Area, 1990 to 2002



Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Generally speaking, when shrimp sales increase in Quebec compared with the sales of other species, the Gaspé Area, which dominates this processing sector, experiences an increase in its share of sales in Quebec. However, when the relative value for lobster or

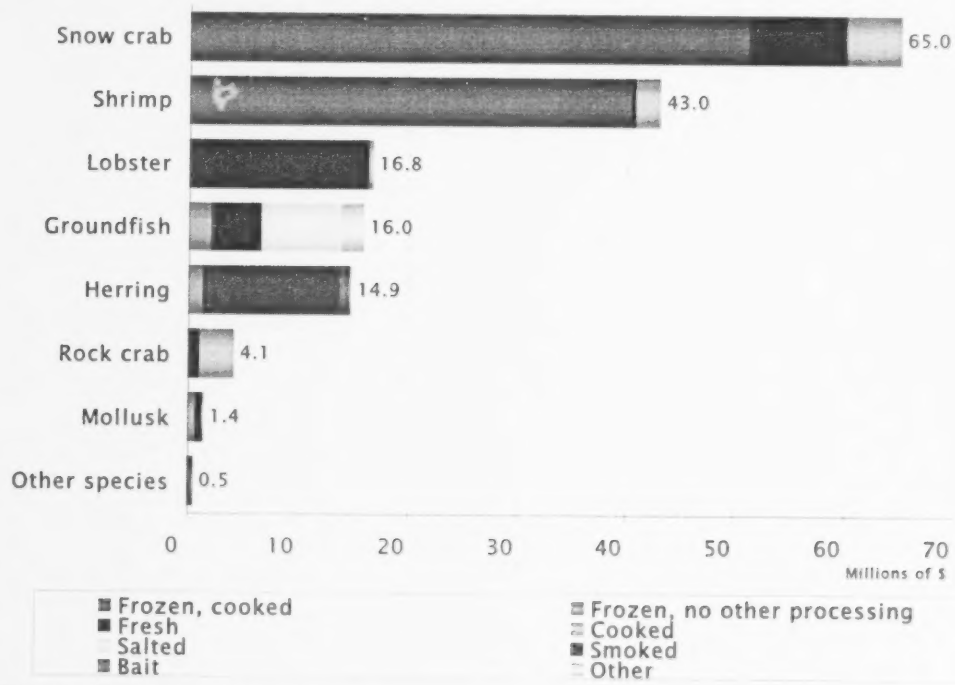
[13] The term "processing" refers to all activities in the fishing industry's secondary and tertiary sector.

snow crab sales increases, such as what happened for many years in the last decade, the proportion for the Gaspé Area decreases.

2.2.2. Species Sold

In 2002, snow crab sales in the Gaspé Area topped $65 million. This level made snow crab the most processed species in this maritime sector. Shrimp ranked second with sales of $43 million. Even though some quantities of snow crab and shrimp are sold on the domestic market, a large portion is exported. Quebec's snow crab and shrimp exports are mostly destined for the United States. These two species are mostly sold cooked and frozen and account for 67% of the Gaspé Area's production. They are followed by lobster, groundfish (cod, halibut) and herring with $16.8 million, $16 million and $14.9 million, respectively. Altogether, these sales make up 30% of the Gaspé Area's production. Other species, such as rock crab, crustaceans and mackerel, account for less than 4% with sales evaluated at approximately $6 million.

Graph 31: Value and Composition of Production in the Gaspé Area, 2002

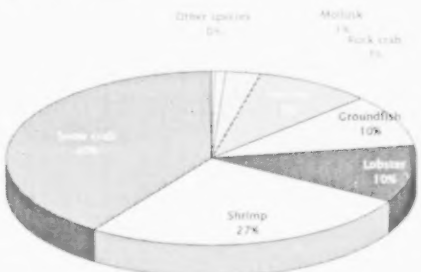


Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Between 1990 and 1995, the proportion of groundfish in the total sales of the Gaspé Area's marine products continued to decline from 37% to 14%. This decline did nothing to halt the downward trend that started in 1987 when this proportion was 48%. Snow crab, which total sales increased from 19% to 50% during the same period, made up for the decline in groundfish sales.

Between 1996 and 2002, the proportion of the different species sold in the Gaspé Area experienced fluctuations without allowing us to note any clear upward or downward trend for any species. However, we can explain these fluctuations by the value of snow crab production which fluctuated greatly during these years.

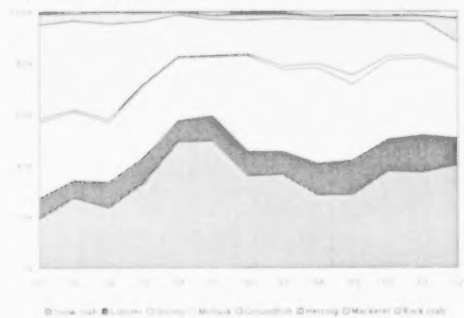
Graph 32: Composition of Species Sold, % of Value, Gaspé Area, 2002



Total Production : $161.7 M

Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Graph 33: Composition of Species Sold, % of Value, Gaspé Area, 1990 to 2002



Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

2.2.3. Labour

In 2002, the number of jobs in the marine product processing sector was estimated at slightly more than 2 300. Of that number, we estimate the number of people working in the processing and sales sectors for lobster at 1 000, 500 for shrimp, 325 for groundfish and 200 for herring. Even if the number of employees in this industry in 2002 was higher than the number of the last four years, this number was still lower than the level at the beginning of the 1990s, when more than 2 500 people were working in this industry. We must note that these numbers refer to the maximum number of employees and that most of these jobs are seasonal.

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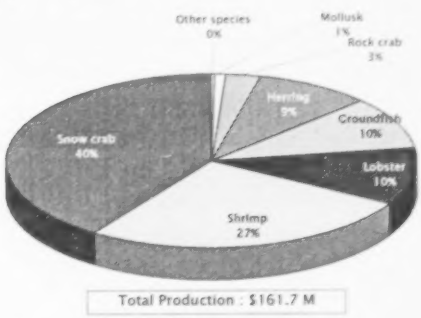

Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Graph 33: Composition of Species Sold, % of Value, Gaspé Area, 1990 to 2002

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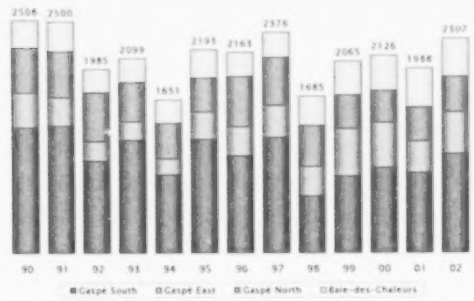
Graph 34: Number of Jobs in the Marine Product Processing Sector, Gaspé Area, 1990 to 2002



Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Table 6: Main Businesses in the Gaspé Area, Marine Product Processing Sector, 2002

BUSINESS NAME	COMMUNITY NAME	NUMBER OF JOBS	PRODUCTION
E. GAGNON & FILS	SAINTE-THÉRÈSE-DE-GASPÉ	325 to 350	$10 to $25 M
UNIPÊCHES	PABOS	250 to 275	$10 to $25 M
LES FRUITS DE MER GASCONS	GASCONS	225 to 250	$5 to $10 M
LES PÊCHERIES MARINARD	RIVIÈRE-AU-RENARD	200 to 225	$10 to $25 M
POISSON SALÉ GASPÉSIEN	GRANDE-RIVIÈRE-OUEST	150 to 175	Under $5 M
CREVETTES DU NORD ATLANTIQUE	L'ANSE-AU-GRIFFON	125 to 150	$10 to $25 M
FRUITS DE MER DE L'EST DU QUÉBEC	MATANE	100 to 125	N/A
LELIÈVRE, LELIÈVRE ET LEMOIGNAN	SAINTE-THÉRÈSE-DE-GASPÉ	100 to 125	Under $5 M
LE MARCHÉ BLAIS	PABOS	100 to 125	N/A
PRODUITS MARINS DE ST-GODEFROY	SAINT-GODEFROY	75 to 100	Under $5 M
CUSIMER	MONT-LOUIS-OUEST	50 to 75	Under $5 M
LES FUMOIRS GASPÉ CURED	CAP-D'ESPOIR	50 to 75	N/A
52 OTHER BUSINESSES		481	$42.1 M
TOTAL		2513	$161.7 M

Sources: MAPAQ, CRIQ and DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

2.2.4. Businesses

In 2002, the marine product processing sector in the Gaspé Area had 64 businesses distributed among about forty communities. However, the 12 most important businesses in this sector (see Table 6) accounted for close to 75% of the sales and 82% of the jobs in the industry. These twelve businesses employed between 50 and 400 employees and were usually equipped with processing machines. The other 52 businesses averaged less than 10 employees with sales of $800 K. These smaller businesses are usually specialized in sales and performed little processing of the marine products they purchased from fishermen.

2.2.5. Outlook for 2003

Even though data on the processing sector is not yet available for 2003, we will present estimates based on preliminary data on landings. According to these values, landed value increased 2% in the Gaspé Area in 2003 to $83 million, while on the provincial scale, landed value declined more than 8%. We can expect that sales for the marine products of the Gaspé Area's businesses will remain relatively stable in 2003 and that their sales proportion in Quebec will increase significantly.

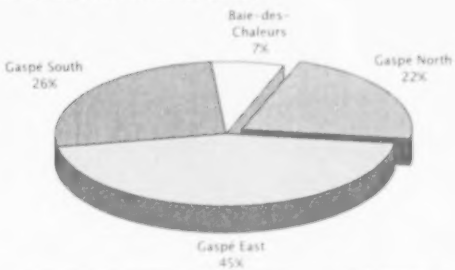
3. The Fishing Industry in Gaspé North: An Overview

3.1. Marine Fisheries

3.1.1. Evolution of Landings

In 2003, landings in Gaspé North made up 22% of the Gaspé Area's commercial fishing activities in terms of value and volume. Landings in this sub-sector accounted for close to 7 000 t worth $18.5 million, which represented 11% of the total landings for Quebec.

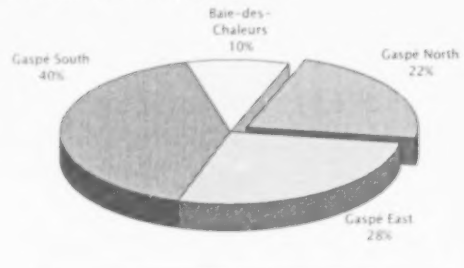
Graph 35: Evolution of Landings in the Gaspé Area by Sub-Sector, in Volume, 2003p



Volume of Landings in Gaspé Area: 32 037 t

Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Graph 36: Evolution of Landings in the Gaspé Area by Sub-Sector, in Value, 2003p



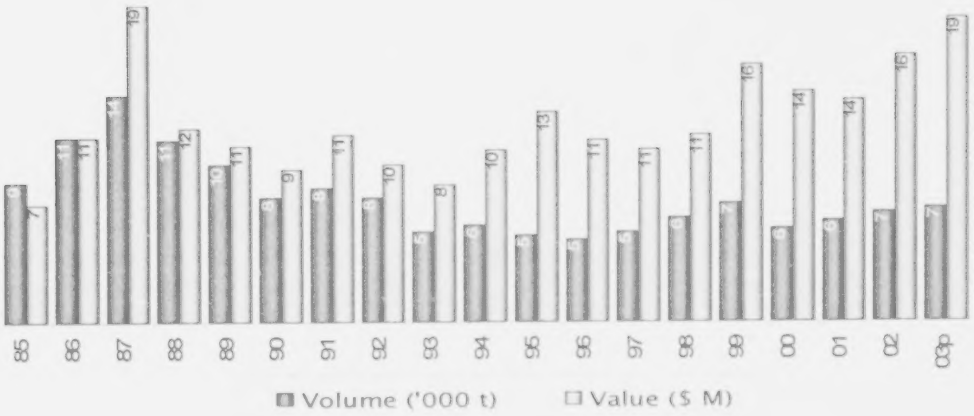
Value of Landings in Gaspé Area: 84,8 M$

Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

In 2003, commercial fishing landings were made in 14 fishing ports in Gaspé North. The most important ports in terms of volume were, in order: Saint-Anne-des-Monts, Matane and Rimouski-East. These three ports are also the most important in terms of value except that the Port of Rimouski-East ranks first, followed by Matane and Saint-Anne-des-Monts.

On the provincial scale, these three ports rank 6th (Saint-Anne-des-Monts), 7th (Matane) and 8th (Rimouski-East) in terms of volume and 5th (Rimouski-East), 10th (Matane) and 20th (Saint-Anne-des-Monts) in terms of value. Snow crab is the main activity for the Port of Rimouski-East, and shrimp fishing is the main activity for Matane and Saint-Anne-des-Monts.

Graph 37: Evolution of Landings in the Fishing Industry, Gaspé North, 1985-2003p



Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

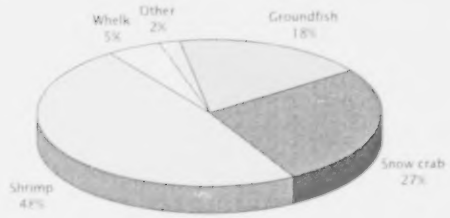
Landings in Gaspé North experienced the same decline as the entire maritime sector of the Gaspé Area after the moratorium on cod fishing was issued at the beginning of the 1990s. In 2003, landed volumes totalled nearly 7 000 t, which represented a decline of 3 500 t compared with the average landed volume between 1985 and 1990. Snow crab, shrimp and Greenland halibut now account for more than 90% of the commercial fishing activities in terms of volume and value in Gaspé North.

The high-value of crustaceans allowed this sub-sector to post, since 1995, its five best years, except for 1987 which was an historical record for this maritime sub-sector due to high landings of groundfish.

3.1.2. Species Landed

In 2003, shrimp topped the list in terms of volume while snow crab fishing was generating most of the commercial fishing revenues on the Gaspé North territory. Shrimp made up nearly half of the landed volumes with 3 400 t, followed by snow crab with 1 900 t and groundfish with 1 300 t. Also, Greenland halibut accounted for more than 90% of all the groundfish fishing activities.

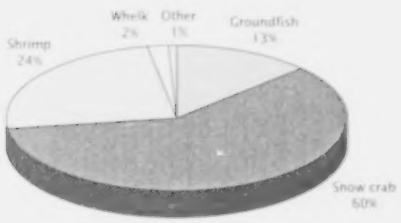
Graph 38: Breakdown of Species Landed, in Volume, Gaspé North, 2003p



Total Volume of Landings: 6 957 t

Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Graph 39: Breakdown of Species Landed, in Value, Gaspé North, 2003p



Total Value of Landings: 18,5 M$

Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

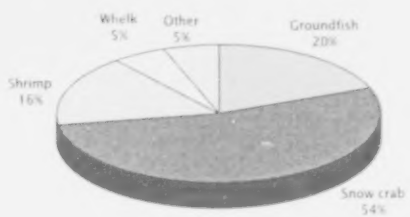
Due to its high landing price, snow crab accounted for approximately 60% of the commercial fishing revenues on this territory with slightly more than $11 million. Shrimp ranked second with $4.5 million, and finally groundfish with $2.4 million.

Whelk is an emerging species in this sub-sector. In 2003, whelk made up 5% of the landed volume and 2% of the landed value in Gaspé North.

3.1.3. Workforce

73 fishing businesses were active in Gaspé North in 2003. Of this number, 39 were operating in the snow crab fishing sector. Fourteen businesses were fishing for groundfish, 14 for shrimp and 4 for whelk.

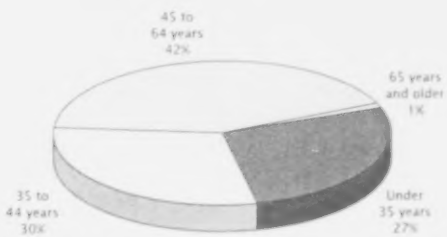
Graph 40: Distribution of Fishing Businesses, According to Main Species Landed, Gaspé North, 2003p



73 fishing businesses

Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Graph 41: Distribution of Fishermen and Fisherman's Helpers According to Age, Gaspé North, 2003p

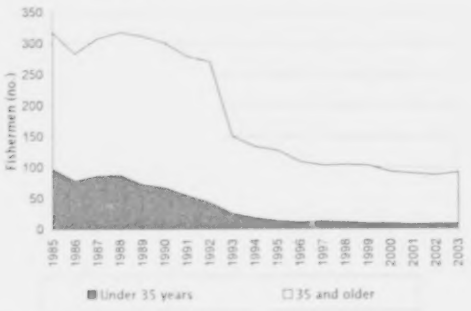


Fishermen and fisherman's helpers: 292

Sources: Statistical Services, DFO, Quebec Region for fishermen and BAPAP for fisherman's helpers
Compilation: DRPE, DFO, Quebec Region

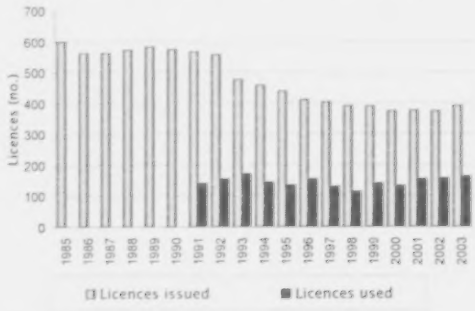
In 2003, 300 fishermen and fisherman's helpers were working on the Gaspé North territory. The age distribution for fishermen and fisherman's helpers in Gaspé North is relatively the same as the average for Quebec. Of these workers, 42% were between 45 and 64 years of age, 30% between 35 and 44, and 27% less than 35 years of age.

Graph 42: Evolution of the Number of Fishermen According to Age, Gaspé North, 1985-2003p



Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Graph 43: Evolution of the Number of Licences According to Status, Gaspé North, 1985-2003p

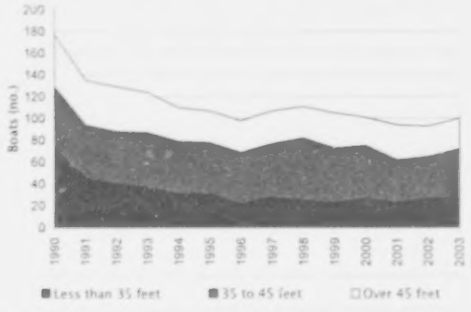


Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region
Note: Data on active licences is not available for the period before 1991.

Since 1985, the number of fishermen has declined more than 70%. Gaspé North had slightly less than 100 fishermen in 2003. Between 1985 and 2003, the number of licences issued dropped 35% to close to 400 licences issued in 2003. The average number of licences held by each fisherman went from 1.9 in 1985 to 4.3 in 2003.

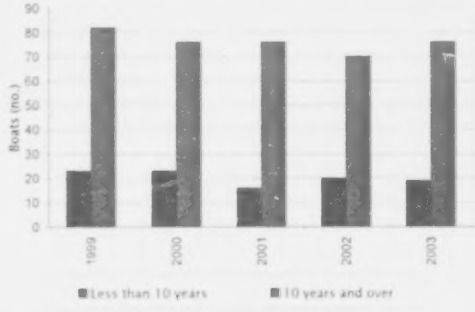
Generally, a large number of the licences issued remain inactive. In fact, only 40% of the licences issued in this sub-sector were active in 2003. This proportion of active licences is however higher than the Quebec average (34%).

Graph 44: Evolution of the Number of Active Fishing Boats According to Size, Gaspé North, 1990-2003p



Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Graph 45: Evolution of the Number Active Fishing Boats According to Age, Gaspé North, 1999-2003p



Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

In 2003, approximately 100 fishing boats were active in this sub-sector. This number represented a decline of nearly 50% compared with the number of fishing boats that were operating in the 1990 fishing season. Since 1990, the number of active fishing boats more than 35 feet in length has declined slightly and the number of active fishing boats less than 35 feet in length has declined significantly. In 2003, 27% of the fishing boats in this sub-sector were less than 35 feet in length, 45% were between 35 and 45 feet in length, and 28% more than 45 feet in length.

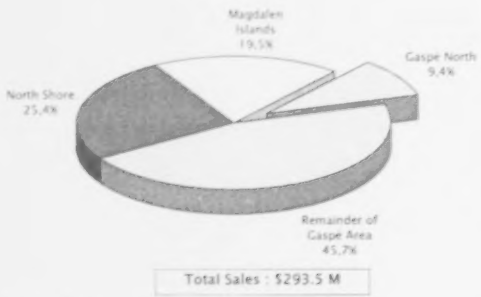
As for boats aged less than ten years, they are not used as much as they are in Quebec's other maritime sub-sectors. Between 1999 and 2003, 20% of these boats were still used compared with the Quebec average of 28%.

3.2. Processing of Fishery Resources

3.2.1. Evolution of Sales

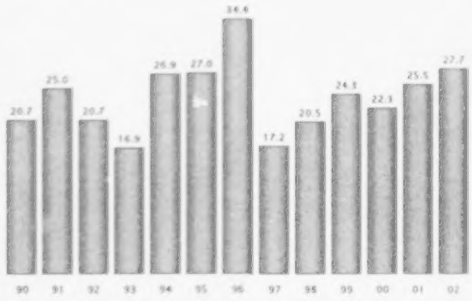
The processing industry in Gaspé North consists of about thirty businesses. In 2002, these businesses purchased[14] $16 million worth of fish and seafood and sold it for $27.7 million, which represented 17.1% of the total sales for the Gaspé Area and 9.4% for Quebec.

Graph 46: Distribution of the Sale of Marine Products in the Maritime Sectors of Quebec, 2002



Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Graph 47: Evolution of Sales for Processing businesses in Gaspé North, 1990 to 2002



Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Sales of marine products in Gaspé North have experienced major fluctuations during the last twelve years. Sales went from $20.7 million in 1990 to an historic record of $34.4 million in 1996, then dropped to $17.2 million in 1997 and jumped to $27.7 million in 2002. These fluctuations are mostly due to shrimp; its production fluctuated between

[14] 78.3% of the purchases of these businesses come from ports in Gaspé North, 19.9% from ports in Gaspé East.

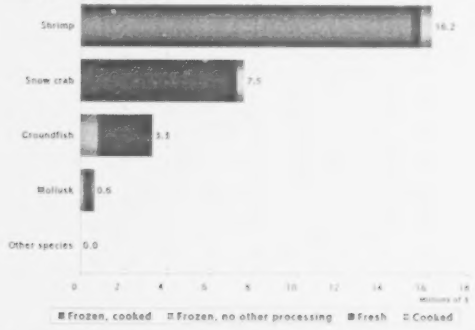
$10 million and $28 million during these years. Sales from other species remained relatively stable.

3.2.2. Species Sold

In 2002, $16.2 million worth of shrimp was sold in Gaspé North, which makes it the most processed species in this sub-sector (58% of the total sales), far ahead of snow crab ($7.8 million - 28%) and groundfish ($3.3 million - 12%). Sales for all other species were worth approximately $600 K, which represented slightly more than 2% of the sales for this sub-sector.

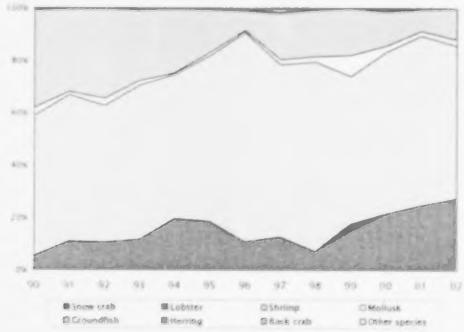
More than 94% of the shrimp production is sold cooked and frozen. Also, 96% of Gaspé North's snow crab production is sold fresh compared with other sub-sectors where this species is usually sold frozen. Finally, more than 75% of the groundfish production (Greenland halibut, cod) is sold fresh and the remaining percentage is sold frozen.

Graph 48: Value and Composition of Production in Gaspé North, 2002



Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Graph 49: Composition of Species Sold, % of Value, Gaspé North, 1990 to 2002



Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Like many maritime sub-sectors in Quebec, Gaspé North was hit hard by the collapse of fish stocks. In fact, the proportion of groundfish in the total sales of marine products of Gaspé North dropped 30% between 1990 and 1996 from 37% to 7%. This drop did nothing to rectify the downward trend that started in 1987 when the proportion of groundfish was 47% in this sub-sector. Shrimp and snow crab, whose shared total sales went from 59% to 91% between 1990 and 1996, made up for the decline in groundfish sales.

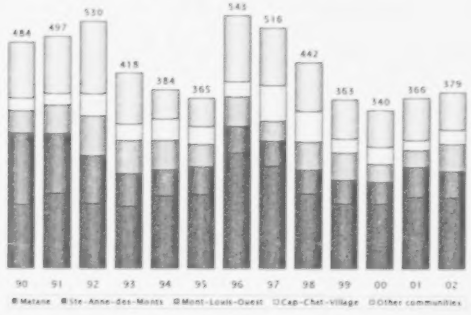
For the years 1997 to 2002, the different species sold in Gaspé North did not really change. However, we can outline the relative importance of crustaceans (scallop and whelk), Which have made up between 1% and 8% of Gaspé North's production year after year since 1990.

3.2.3. Labour

Estimated at 379, the number of people working in Gaspé North's marine product processing sector in 2002 was higher than the number observed three years before but largely lower than average of this same industry during the 1990s. In fact, the average number of jobs in the processing sector exceeded 450 during the last decade and peaked in 1996 with 542.

In 2002, out of these 379 jobs in the Gaspé North sub-sector, 160 were in the shrimp processing and sales sectors, 105 in Greenland halibut processing and sales and 60 in snow crab processing and sales. We note that these numbers represent the maximum number of employees and the fact that most of these jobs are seasonal.

Graph 50: Number of Jobs in the Marine Product Processing Sector, Gaspé North, 1990 to 2002



Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Table 7: Main Businesses in Gaspé North, Marine Product Processing Sector, 2002

BUSINESS NAME	COMMUNITY NAME	NUMBER OF JOBS	PRODUCTION
FRUITS DE MER DE L'EST DU QUÉBEC	MATANE	100 to 125	N/A
CUSIMER	MONT-LOUIS-OUEST	50 to 75	Under $5 M
CRUSTACÉS DES MONTS	SAINTE-ANNE-DES-MONTS	25 to 50	Under $5 M
LES ALIMENTS FIDAS	CAP-CHAT VILLAGE	25 to 50	Under $5 M
POISSONNERIE DU PHARE OUEST	MATANE	10 to 25	N/A
POISSONNERIE BLANCHETTE	SAINT-JOACHIM-DE-TOURELLE	10 to 25	Under $5 M
POISSONNERIE DE RIMOUSKI EST	RIMOUSKI	10 to 25	N/A
25 OTHER BUSINESSES		65	$7.2 M
TOTAL		379	$27.7 M

Source: MAPAQ, CRIQ and DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

3.2.4. Businesses

In 2002, Gaspé North's marine product processing sector consisted of 30 businesses distributed among about fifteen communities. Despite this relatively high number of businesses, most of the production and jobs were concentrated in a small number. For example, only seven businesses had more than ten employees and only three of these businesses had revenues of more than $2 million. The three largest businesses (see Table 7) accounted for 66% of the production and 58% of the jobs. The 27 other businesses, smaller in size, averaged six employees and revenues of approximately $350 K. These businesses, compared to the large three, performed little processing and were specialized in marine product distribution.

3.2.3. Labour

Estimated at 379, the number of people working in Gaspé North's marine product processing sector in 2002 was higher than the number observed three years before but largely lower than average of this same industry during the 1990s. In fact, the average number of jobs in the processing sector exceeded 450 during the last decade and peaked in 1996 with 542.

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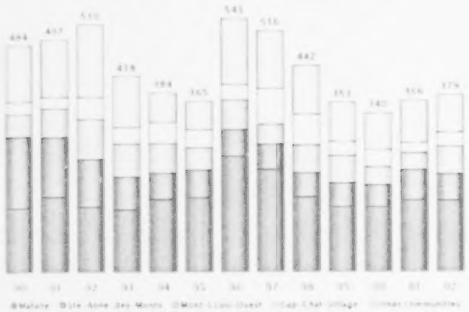

Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

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BUSINESS NAME	COMMUNITY NAME	NUMBER OF JOBS	PRODUCTION
[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]
TOTAL		379	$27.7 M

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3.2.5. Outlook for 2003

Even though data on the processing sector is not yet available for 2003, we will present estimates based on the preliminary data on landings. According to these values, landed value increased 12% in Gaspé North in 2003 to $18.5 million, while we observed a decline of more than 8% for Quebec and a modest gain of 2% for the Gaspé Area. We can expect that data on the processing industry in 2003 will show an increase in sales. We also expect an increase in the share of this sub-sector's production compared with the total production in Quebec and in the Gaspé Area.

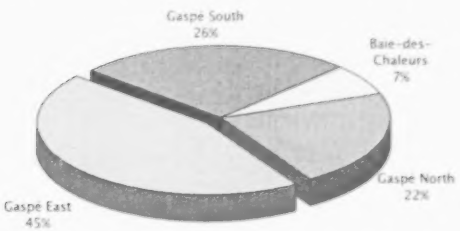
4. The Fishing Industry in Gaspé East: An Overview

4.1. Marine Fisheries

4.1.1. Evolution of Landings

Gaspé East is the main sub-sector in the Gaspé Area in terms of landed volume with 14 400 t in 2003. This volume represented 45% of the total landed volumes in the Gaspé Area and slightly more than 25% of the total landed volume in Quebec. As for the landed value, this sub-sector ranks second behind the Gaspé South sub-sector with $23.5 million, which represented 28% of the total landed value in the Gaspé Area and 15% in Quebec.

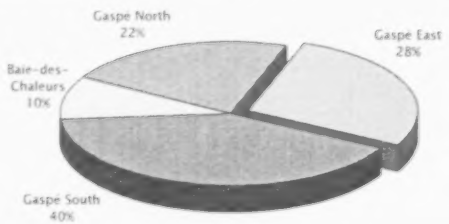
Graph 51: Evolution of Landings in the Gaspé Area by Sub-Sector, in Volume, 2003p



Volume of Landings in Gaspé Area: 32 037 t

Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Graph 52: Evolution of Landings in the Gaspé Area by Sub-Sector, in Value, 2003p



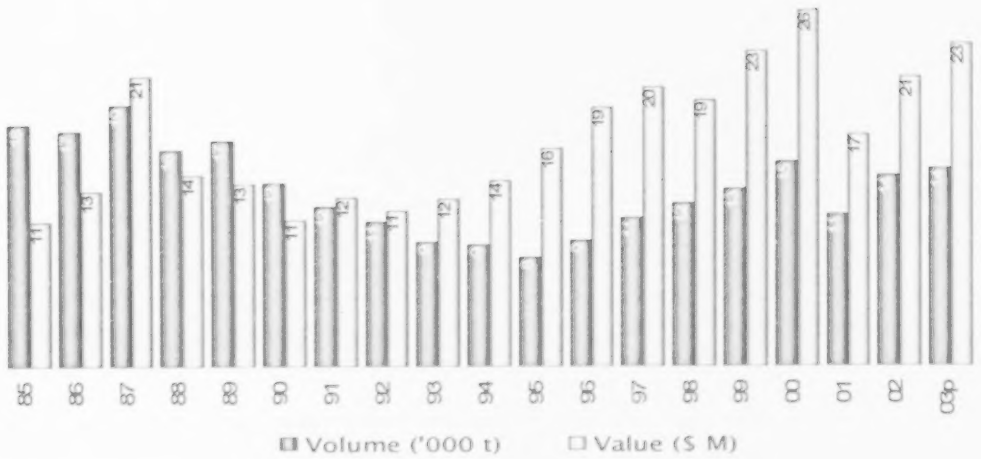
Value of Landings in Gaspé Area: 84,8 M$

Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

In 2003, commercial fishing landings were made in nine ports in Gaspé East. The most important ports in terms of volume and value are, in order, Rivière-au-Renard, Cloridorme and Grande-Vallée. The Port of Rivière-au-Renard is also the most important in Quebec with a landed volume of 14 100 t worth $22.8 million. In 2002, this port ranked 9th in terms of volume and 16th in terms of value compared with all of the ports in Atlantic Canada.

On a lesser scale, the Port of Cloridorme ranks 37th in terms of volume and 43th in terms of value among the Quebec ports in 2003. The Port of Grande-Vallée ranks 48th in terms of volume and 44th in terms of value.

Graph 53: Evolution of Landings in the Fishing Industry, Gaspé East, 1985-2003p



Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

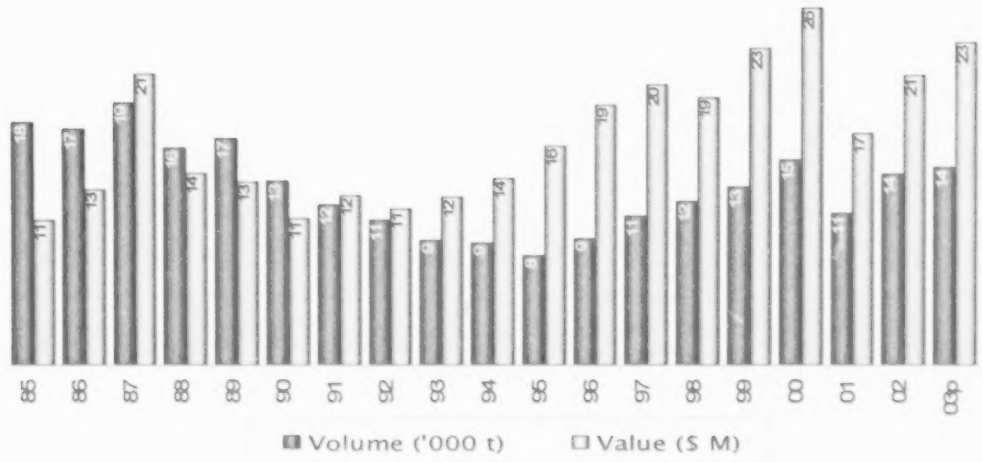
Constant growth in shrimp fishing at the beginning of the 1990s enabled this sub-sector to significantly increase the volume and value of its landings. Landed values posted since 1996 are among the highest in history for this sub-sector. Landed value averaged $21.1 million between 1996 and 2003, compared with the historical record of $21.2 million.

Landed volumes of shrimp also allowed this sub-sector to generate fishing activities comparable with their level at the end of the 1980s. We observed a decline in the landed volumes for the first moratoriums on groundfish followed with a recovery due to an increase in the Gulf's shrimp quotas. In 2003, total landings were 14 400 t, compared with the average of 15 200 t posted between 1985 and 1992.

4.1.2. Species Landed

Again, landed volume and value outline the importance of shrimp fishing activities for Gaspé East. This resource makes up 87% of the landed volume and nearly 75% of the landed value for this sub-sector. Snow crab ranks second with 5% of the landed volume but nearly 20% of the total landed value. Groundfish, lobster and rock crab make up the other main landed species.

Graph 53: Evolution of Landings in the Fishing Industry, Gaspé East, 1985-2003p



Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

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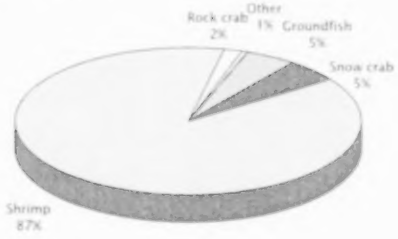
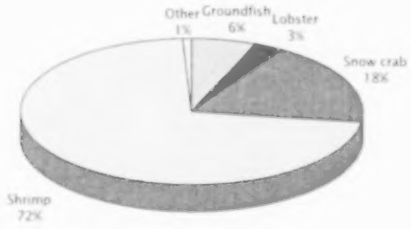
Graph 54: Breakdown of Species Landed, in Volume, Gaspé East, 2003p



Total Volume of Landings: 14 411 t

Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Graph 55: Breakdown of Species Landed, in Value, Gaspé East, 2003p



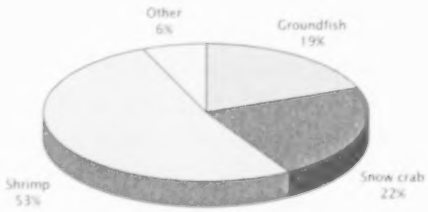
Total Value of Landings: 23,5 M$

Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

4.1.3. Workforce

In 2003, 63 fishing businesses were active in the sub-sector of Gaspé East. More than half of the active fishermen in this sub-sector were mainly fishing for shrimp. Snow crab fishing was the main activity for 14 fishing businesses, while groundfish fishing was the main activity for 12 businesses in this sub-sector.

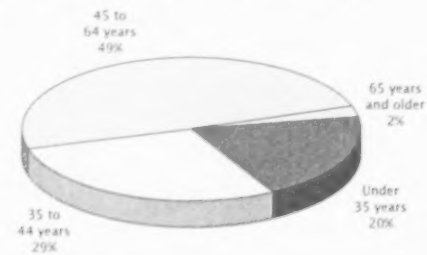
Graph 56: Distribution of Fishing Businesses, According to Main Species Landed , Gaspé East, 2003p



63 fishing businesses

Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Graph 57: Distribution of Fishermen and Fisherman's Helpers According to Age, Gaspé East, 2003p

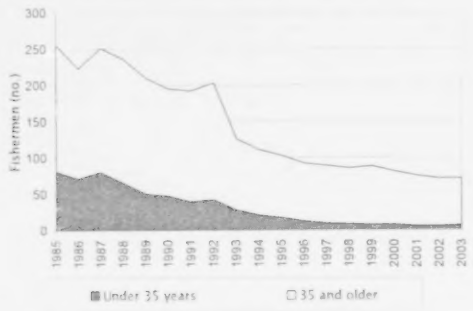


Fishermen and fisherman's helpers: 242

Source: Statistical Services, DFO, Quebec Region for fishermen and BAPAP for helpers
Compilation: DRPE, DFO, Quebec Region

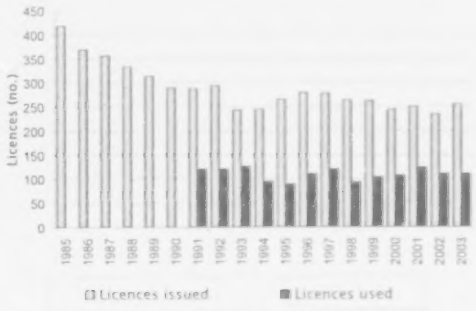
The Gaspé East sub-sector consists of approximately 250 fishermen and fisherman's helpers. Nearly half (49%) of these people are between 45 and 64 years old, 29% between 35 and 44 and 20% less than 30 years of age. The proportion of people aged less than 35 is 5% lower than the Quebec average and this proportion is redistributed in the 45 to 64 years of age group, which is 5% higher than the Quebec average.

Graph 58: Evolution of the Number of Fishermen According to Age, Gaspé East, 1985-2003p



Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Graph 59: Evolution of the Number of Licences According to Status, Gaspé East, 1985-2003p

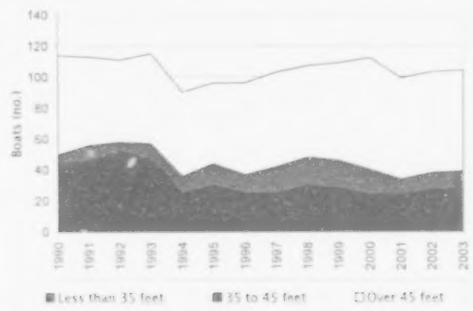


Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region
Note: Data on active licences is not available for the period before 1991.

Since 1985, the number of fishermen in the sub-sector of Gaspé East decreased more than 70% to 70 fishermen in 2003. During this same period, the number of licences issued in this sub-sector posted a decline of nearly 40% to close to 255 licences issued in 2003. The number of licences held by each fisherman rose from 1.6 in 1985 to 3.6 in 2003, which represented an average increase of two licences per fisherman.

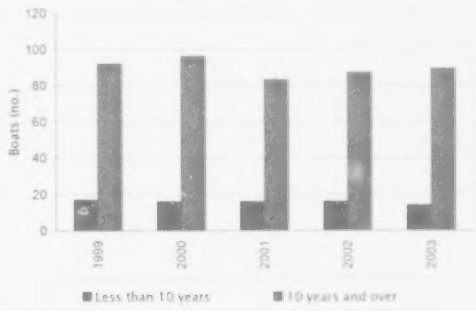
In general, a large number of licences issued remain inactive. In fact, only 43% of all the licences issued were active in 2003 and this level has remained relatively stable since the beginning of the 1990s. The rate of use of the licences issued in the sub-sector of Gaspé East is 10 percent higher than the Quebec average.

Graph 60: Evolution of the Number of Active Fishing Boats According to Size, Gaspé East, 1990-2003p



Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Graph 61: Evolution of the Number of Active Fishing Boats According to Age, Gaspé East, 1999-2003p



Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Since 1990, the number of active boats in the maritime sector of Gaspé East is relatively constant with an average of 105 boats. In 2003, this maritime sub-sector had 100 active

fishing boats. The main characteristic of this sub-sector is the growing number of boats more than 45 feet in length. The midshore fleet in the Port of Rivière-au-Renard explains in part this regional particularity. In 2003, the proportion of boats more than 45 feet in length was 63% while it was 16% for Quebec. The number of active boats less than 45 feet in length has been relatively constant since 1994. In 2003, 26% of the boats in this sub-sector were less than 35 feet in length, and 12% of the boats were between 35 and 45 feet in length.

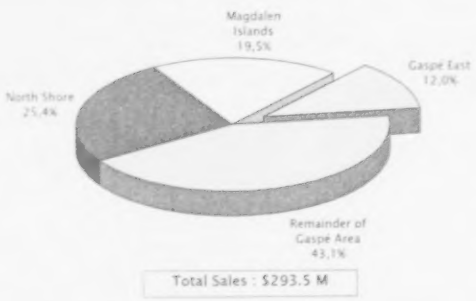
As for the age of the fishing boats, we observe some stability as for the use of boats of less than ten years old between 1999 and 2003. In 2003, these boats accounted for nearly 14% of the active fleet, which represented nearly half of the Quebec average.

4.2. Processing of Fishery Resources

4.2.1. Evolution of Sales

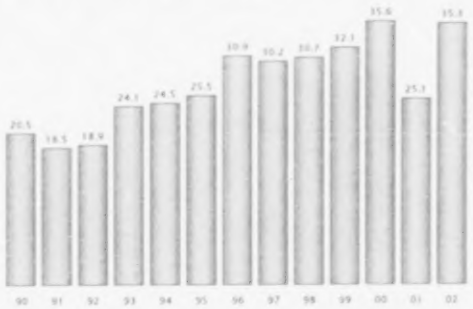
The processing industry in Gaspé East consists of six businesses. In 2002, these businesses purchased $15.1 million worth of fish and seafood and sold it for $35.3 million, which represented 21.8% of the sales for Gaspé and 12% for Quebec.

Graph 62: Distribution of the Sale of Marine Products in the Maritime Sectors of Quebec, 2002



Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Graph 63: Evolution of Sales for Processing Businesses in Gaspé East, 1990 to 2002



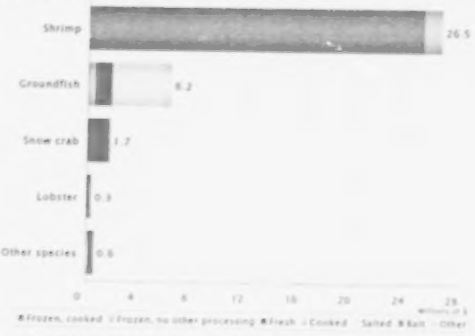
Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Since 1990, the sale of marine products by Gaspé East businesses experienced a relatively constant increase from $20.5 million in 1990 to $35.3 million in 2002. Shrimp sales dropped nearly $9 million in 2001, and therefore, total sales dropped significantly that year from $35.6 million in 2000 (record year) to $25.1 million in 2001, which represented a decline of close to 30%.

4.2.2. Species Sold

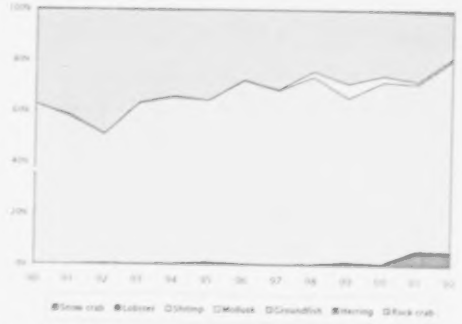
In 2002, shrimp sold for $26.5 million in Gaspé East. This level represented about 75% of the production in this sub-sector. Shrimp were mostly sold cooked and frozen. Two other species have seen their sales exceed $1 million: cod ($4.7 million), which accounted for 76% of groundfish sold in this sub-sector, and snow crab ($1.7 million). They are followed by species that sold for between $200K and $1 million: Greenland halibut, Atlantic halibut, lobster, scallop and rock crab.

Graph 64: Value and Composition of Production in Gaspé East, 2002



Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Graph 65: Composition of Species Sold, % of Value, Gaspé East, 1990 to 2002



Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

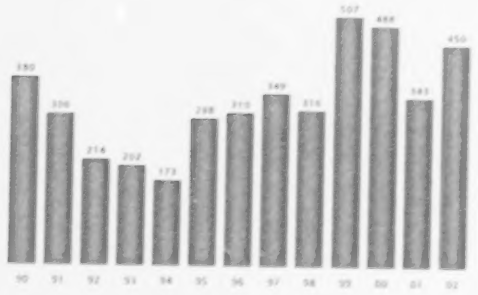
As in the other maritime sub-sectors in Quebec, the sales composition for the processing industry in Gaspé East changed during the last twelve years. The proportion of groundfish in the total sales of Gaspé East fell from 37% to 18% between 1990 and 2002. This decline follows the drop that started in 1986 when groundfish accounted for 70% of the sales. As for shrimp, their proportion went from 62% to 75% between 1990 and 2002, and made up for nearly all the decline in groundfish sales.

4.2.3. Labour

In 2002, 450 people were working in the marine product processing businesses of Gaspé East. Of this number, we evaluate the number of people working in the processing and sales sector for snow crab at 335, 45 for cod, 20 for rock crab and 50 for all other species together.

Even though the number of employees in this industry in 2002 was lower than the level observed in 1999 and 2000, it is still significantly higher than the number of employees observed between 1990 and 1998 when the level was generally less than 350. The number of jobs in 2002 also showed a gain of 30% compared with 2001 when shrimp sales were significantly lower than usual. We must note that these numbers refer to the maximum number of employees and the fact that these jobs are mostly seasonal.

Graph 66: Number of Jobs in the Marine Product Processing Sector in Gaspé East, 1990 to 2002



Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Table 8: Main Businesses in Gaspé East, Marine Product Processing Sector , 2002

BUSINESS NAME	COMMUNITY NAME	NUMBER OF JOBS	PRODUCTION
LES PÊCHERIES MARINARD	RIVIÈRE-AU-RENARD	200 to 225	$10 to $25 M
CREVETTES DU NORD ATLANTIQUE	L'ANSE-AU-GRIFFON	125 to 150	$10 to $25 M
LES PÊCHERIES GASPÉSIENNES	RIVIÈRE-AU-RENARD	25 to 50	Under $5 M
PÊCHERIES RIVIÈRE-AU-RENARD	PETITE-RIVIÈRE-AU-RENARD	25 to 50	Under $5 M
POISSONNERIE L'ESPÉRANCE	L'ESPÉRANCE	25 to 50	Under $5 M
POISSONNERIE DE GRANDE-VALLÉE	GRANDE-VALLÉE	Under 10	N/A
TOTAL		450	$35.3 M

Sources: MAPAQ, CRIQ and DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

4.2.4. Businesses

In 2002, Gaspé East's marine product processing sector consisted of six businesses distributed in five communities. The sub-sector's two largest businesses, Les Pêcheries Marinard and Crevettes du North Atlantique (see Table 8), specialized in shrimp processing and account for most of the sales and jobs in the industry in 2002. The four other businesses averaged 29 employees and revenues of $2.2 million.

4.2.5. Outlook for 2003

Even though data on the processing sector is not yet available for 2003, we will present estimates based on preliminary data on landings. According to this information, landed value increased 11% to $23.5 million in Gaspé East in 2003, while we observed a decline of more than 8% for Quebec and a modest gain of 2% for the Gaspé Area. We can expect that data on Gaspé East's processing industry in 2003 will show an increase in sales. We also expect an increase in the proportion of this sub-sector's production compared with the total production for Quebec and the Gaspé Area.

Even though the number of employees in this industry in 2002 was lower than the level observed in 1999 and 2000, it is still significantly higher than the number of employees observed between 1990 and 1998 when the level was generally less than 350. The number of jobs in 2002 also showed a gain of 30% compared with 2001 when shrimp sales were significantly lower than usual. We must note that these numbers refer to the maximum number of employees and the fact that these jobs are mostly seasonal.

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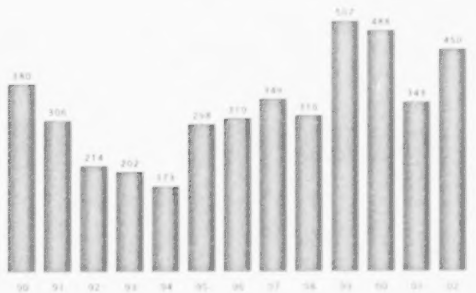

Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

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BUSINESS NAME	COMMUNITY NAME	NUMBER OF JOBS	PRODUCTION
[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]
TOTAL		450	$15.4 M

Sources: MAPAQ, CRIQ and DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

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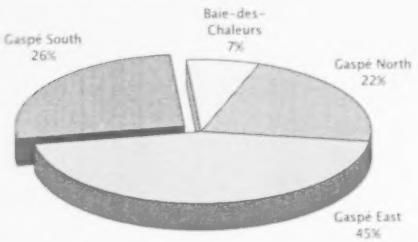
5. The Fishing Industry in Gaspé South: An Overview

5.1. Marine Fisheries

5.1.1. Evolution of Landings

In terms of landed value, Gaspé South is the main sub-sector in the Gaspé Area with landings of $34.6 million in 2003. This amount accounted for 40% of the total landed value for the Gaspé Area and slightly more than 20% of the total landed value for Quebec. As for landed volumes, this sub-sector ranked second in the Gaspé Area with 8 400 t, which accounted for 26% of the total landed volume for the Gaspé Area and 15% for Quebec.

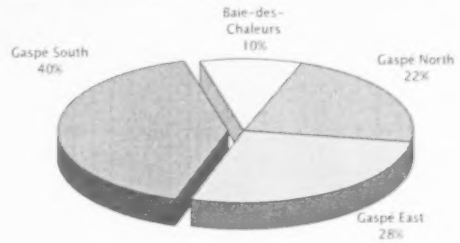
Graph 67: Evolution of Landing in the Gaspé Area by Sub-Sector, in Volume, 2003p



Volume of Landings in Gaspé Area: 32 037 t

Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Graph 68: Evolution of Landing in the Gaspé Area by Sub-Sector, in Value, 2003p



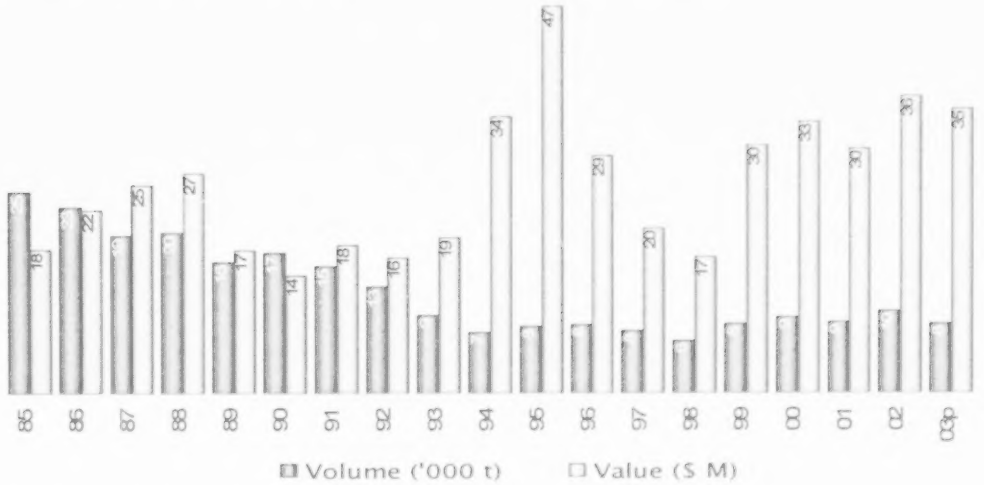
Value of Landings in Gaspé Area: 84,8 M$

Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

In 2003, commercial fishing landings were made in 19 fishing ports in this maritime sub-sector. In terms of volume, the most important ports are, in order: Sainte-Thérèse-de-Gaspé, Grande-Rivière and Newport. The Port of Sainte-Thérèse-de-Gaspé also ranks first in terms of landed value and is followed by Anse-à-Beaufils and Grande-Rivière.

On the provincial scale, the Port of Sainte-Thérèse-de-Gaspé ranked second in terms of landed value in 2003 with $12 million, behind Rivière-au-Renard with a landed value of $22.8 million. In terms of volume, the Port of Sainte-Thérèse-de-Gaspé ranked fourth with 2 700 t. Grande-Rivière was also important in Quebec in 2003 with a landed volume of 2 200 t worth $4.9 million. These amounts gave it the fifth and the eight ranks in terms of volume and value, respectively.

Graph 69: Evolution of Landings in the Fishing Industry, Gaspé South, 1985-2003p



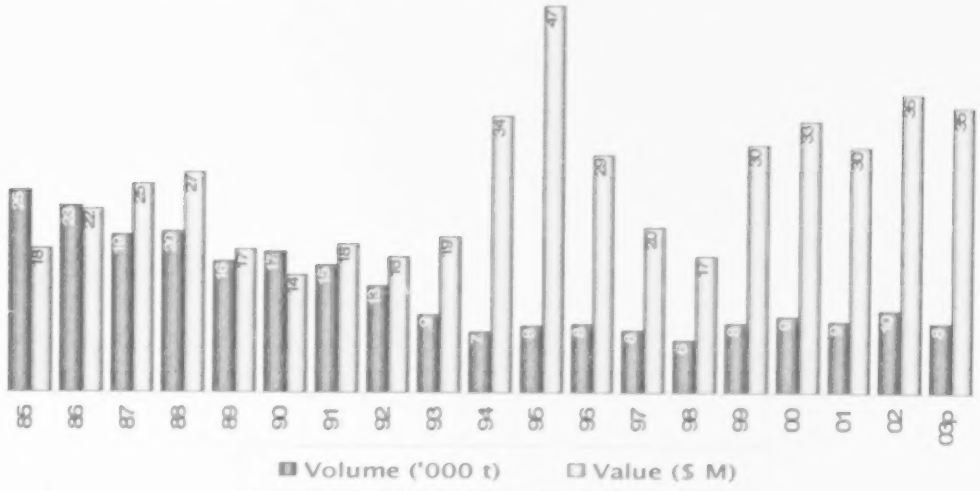
Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Since 1999, landed values for commercial fishing in Gaspé South's sub-sector are significantly higher than the landed values posted before the first moratoriums on groundfish at the beginning of the 1990s. The values for 2002 and 2003 are the two best years for this sub-sector, apart from the record posted in 1995. The high unit value for snow crab and lobster explains these good results. In addition, landed volumes have slightly increased since 1999 even though they are still lower than the results posted before 1993.

5.1.2. Species Landed

Snow crab is the most exploited resource in this maritime sub-sector. Landings for this species account for 3 600 t worth $21.2 million and make up 43% of the landed volumes and more than 60% of the commercial fishing revenues for this sub-sector. The second species in importance for Gaspé South is lobster, which generates revenues of nearly $12 million with catches of 850 t.

Graph 69: Evolution of Landings in the Fishing Industry, Gaspé South, 1985-2003p



Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

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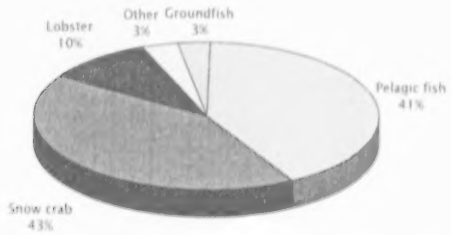
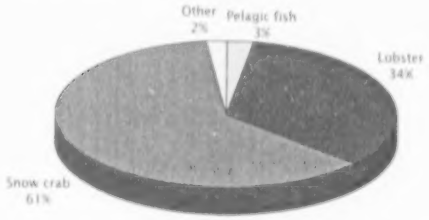
Graph 70: Breakdown of Species Landed, in Volume, Gaspé South, 2003p



Total Volume of Landings: 8 428 t

Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Graph 71: Breakdown of Species Landed, in Value, Gaspé South, 2003p



Total Value of Landings: 34,6 M$

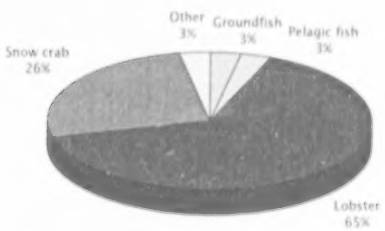
Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Pelagic fish fishing has a certain importance as for landed volumes. This resource make up more than 40% of landings on Gaspé South with close to 3 500 t. However, due to its low landing value, this resource accounts for only 3 % of the revenues of Gaspé South's fishermen.

5.1.3. Workforce

In 2003, 234 fishing businesses were active in the sub-sector of Gaspé South. Close to two-thirds (152) of this number were mainly fishing for lobster, close to one quarter (61) for snow crab and approximately 10% of fishermen (21) for groundfish, pelagic fish and other species.

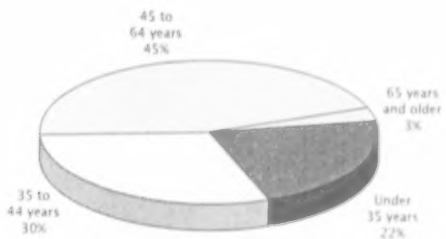
Graph 72: Distribution of Fishing Businesses According to Main Species Landed, Gaspé South, 2003p



234 fishing businesses

Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Graph 73: Distribution of Fishermen and Fisherman's Helpers According to Age, Gaspé South, 2003p

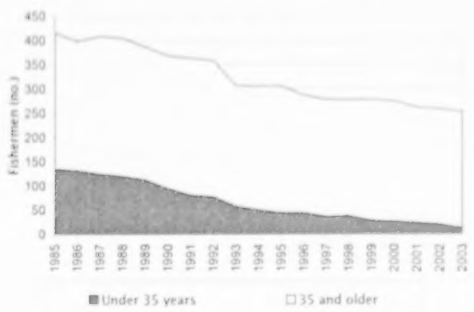


Fishermen and fisherman's helpers: 793

Source: Statistical Services, DFO, Quebec Region for fishermen and BAPAP for fisherman's helpers
Compilation: DRPE, DFO, Quebec Region

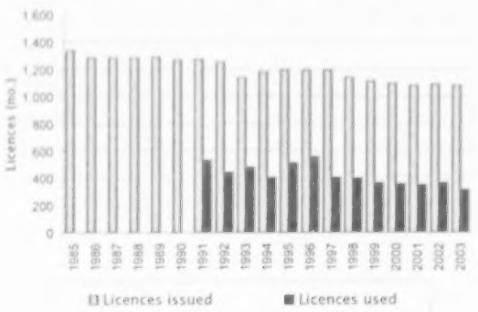
In 2003, the maritime sub-sector of Gaspé South was home to nearly 800 fishermen and fisherman's helpers. Of this number, close to half (48%) were at least 45 years of age, 30% between 35 and 44 years of age and 22% less than 35 years of age. This distribution is relatively identical to the average for Quebec.

Graph 74: Evolution of the Number of Fishermen According to Age, Gaspé South, 1985-2003p



Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Graph 75: Evolution of the Number of Licences According to Status, Gaspé South, 1985-2003p

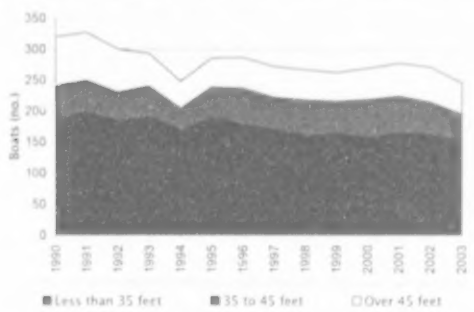


Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region
Note: Data on active licences is not available for the period before 1991.

Since 1985, the number of fishermen dropped nearly 40% to slightly over 250 fishermen in 2003. During the same period, the number of licences issued declined nearly 20% to close to 1 100 licences issued in the sub-sector of Gaspé South in 2003. The average number of licences held by each fisherman went from 3.2 in 1985 to 4.3 in 2003.

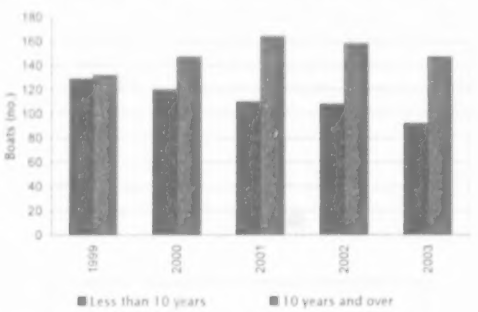
A significant potion of the licences held by fishermen usually remain inactive. In fact, since the beginning of the 1990s, an average of 36% of the licences issued in this sub-sector have been active.

Graph 76: Evolution of the Number of Active Fishing Boats According to Size, Gaspé South, 1990-2003p



Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Graph 77: Evolution of the Number of Active Fishing Boats According to Age, Gaspé South, 1999-2003p



Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

In 2003, 244 fishing boats were active in the sub-sector of Gaspé South. This amount is 24% lower compared with the 340 active boats in this sub-sector in 1990. Since 1990, the number of fishing boats in the three categories has followed the trends. In 2003, 61% of the boats in this sub-sector were less than 35 feet in length, 18% were between 35 and 45 feet in length and 20% were more than 45 feet in length.

Like most of the sectors and sub-sectors in Quebec, the number of active fishing boats aged less than ten years has been constantly declining since 1999. However, this sub-sector accounted for 38% of all active boats with less than ten years of service while the Quebec average is 28%. This aging trend of the fleet may be less important than what is mirrored by statistics since major repairs can be made to the boats in order to extend their operating life. In this case, the boats are still considered old based on the statistics despite renovations.

5.2. Processing of Fishery Resources

5.2.1. Evolution of Sales

The processing industry in Gaspé South consists of about twenty businesses. In 2002, these businesses purchased[15] $37.2 million worth of fish and seafood and sold it for $74.7 million, which made Gaspé South the sub-sector with the highest sales in Quebec. Sales in Gaspé South accounted for 46.1% of the sales for the Gaspé Area and 25.4% for Quebec. With these numbers, Gaspé South even exceeds the sales numbers for the Magdalen Islands and the North Shore.

[15] 93.7% of the purchases made by these businesses come from ports in Gaspé-South, 5.2% from the rest of Gaspé.

Graph 78: Distribution of the Sale of Marine Products in the Maritimes Sectors of Quebec, 2002

Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Graph 79: Evolution of Sales for Processing Businesses in Gaspé South, 1990 to 2002

Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

In Gaspé South, snow crab makes up a significant part of the production of these processing businesses. Landings for this species have fluctuated greatly during the last twelve years; total sales in this sub-sector have generally followed this trend between 1990 and 2002. This correlation is illustrated in Graph 78.

5.2.2. Species Sold

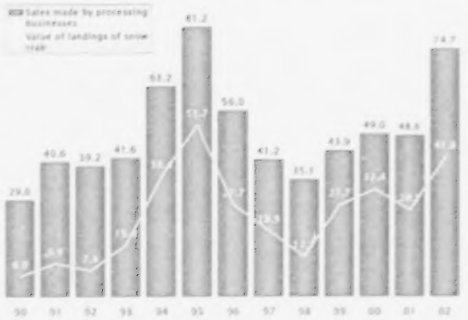
In 2002, snow crab sold for $36.7 million in Gaspé South, and accounted for nearly 50% of the production for this sub-sector. Most of snow crab was sold cooked and frozen but a significant part (13%) was only cooked and not frozen before being sold. Snow crab is followed by lobster ($14.9 million), 99% sold fresh with sales accounting for 88.7% of the lobster production in the Gaspé Area. Since 80% of the lobster landings are made in Gaspé South, it is normal that the proportion of lobster sold by the businesses in this sub-sector is so high.

Herring ranks third as for the most sold species in Gaspé South in 2002, with sales of $14.2 million. This species is mostly sold smoked and accounted for 87% of the total production in Quebec. Herring production in Gaspé South was exceptional in 2002, since it is usually sold as bait and sales rarely exceeded $5 million for Quebec. Two other species have seen their sales exceed one million dollars: cod ($4.8 million) and rock crab ($2.7 million). These species are followed, in order, by shrimp, Atlantic halibut, mackerel, Greenland halibut and scallop, which sold for more than $100 K but less than $1 million.

Graph 78: Distribution of the Sale of Marine Products in the Maritimes Sectors of Quebec, 2002

Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Graph 79: Evolution of Sales for Processing Businesses in Gaspé South, 1990 to 2002



Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

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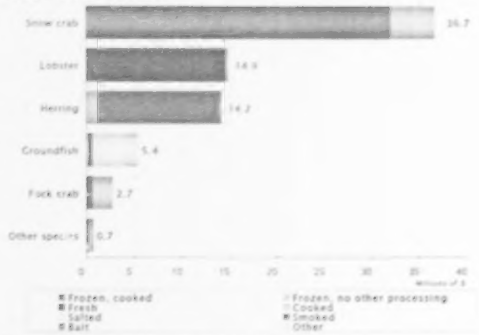
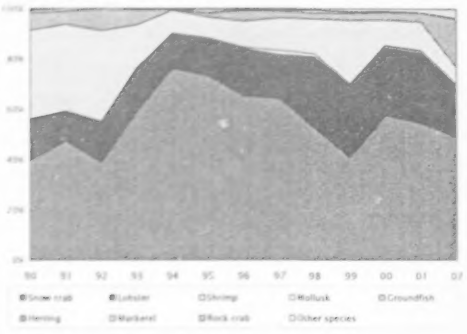
Graph 80: Value and Composition of the Production in Gaspé South, 2002



Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Graph 81: Composition of Species sold, % of Value, Gaspé South, 1990 to 2002



Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

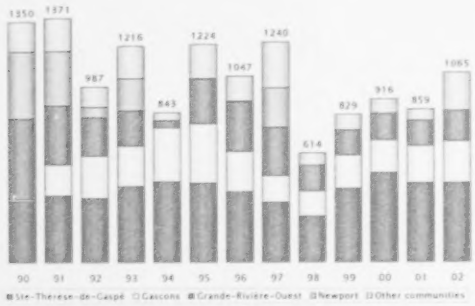
Between 1990 and 1994, the proportion of groundfish in the total sales of marine products in Gaspé South dropped significantly from 35.5% to 9.1%. This proportion posted a record in 1989 when it accounted for 51% of the total sales in this sub-sector. This drop in sales is attributable to the collapse of cod stocks and the moratoriums at the beginning of the 1990s.

Snow crab made up for most of the decline in groundfish, with an increase in its share of sales from 39% to 77% between 1990 and 1994. Between 1995 and 2002, the proportion of the different species sold in the Gaspé Area experiences fluctuations without allowing us to note any clear upward or downward trend for any species. However, we can explain these fluctuations by the value for snow crab production, which fluctuated greatly during these years.

5.2.3. Labour

In 2002, 1 065 people were working for marine product processing businesses in Gaspé South. Of this number, 660 are estimated to have been working in the processing and sales sectors for snow crab, 160 for herring, 80 for cod and 70 for lobster. Even though the number of employees in this industry in 2002 is higher than the number for the last four years, it is still below the number of employees posted in the first half of the 1990s when this amount was 1 200. We must note that these numbers refer to the maximum number of employees and that most of these jobs are seasonal.

Graph 82: Number of Jobs, Marine Product Processing Sector in Gaspé South, 1990 to 2002



Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Table 9: Main Businesses in Gaspé South, Marine Product Processing Sector , 2002

BUSINESS NAME	COMMUNITY NAME	NUMBER OF JOBS	PRODUCTION
E. CASSION & FILS	SAINTE-THÉRÈSE-DE-GASPÉ	325 to 350	$15 to $25 M
LES FRUITS DE MER GASCONS	GASCONS	225 to 250	$5 to $10 M
POISSON SALÉ GASPÉSIEN	GRANDE-RIVIÈRE-OUEST	150 to 175	Under $5 M
LELIÈVRE LELIÈVRE ET LEMIEUX MS	SAINTE-THÉRÈSE-DE-GASPÉ	100 to 125	Under $5 M
LE MARCHÉ BLAIS	PABOS MILLS	100 to 125	N/A
LES FUMOIRS GASPÉ CURED	CAP-D'ESPOIR	50 to 75	N/A
CRUSTACÉS DE MALBAIE	SAINT-GEORGES-DE-MALBAIE	10 to 25	Under $5 M
DEGUST MER	SAINTE-THÉRÈSE-DE-GASPÉ	10 to 25	5 to 10 MS
POISSONNERIE CARON	CAP-D'ESPOIR	10 to 25	N/A
PROD. DE HOMARD DE GRANDE-RIV.	GRANDE-RIVIÈRE	10 to 25	Under $5 M
11 OTHER BUSINESSES		58	$3 to M
TOTAL		1071	$74.7 M

Sources: MAPAQ, CRIQ and DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

5.2.4. Businesses

In 2002, the marine product processing sector in Gaspé South consisted of 21 businesses distributed among about 15 communities. The six most important businesses in this sub-sector (see Table 9) were employing between 50 and 350 people and accounted for 91% of the jobs and nearly 80% of the sales for the industry. Among the fifteen other businesses, four had between 10 and 25 employees with average sales exceeding $3 million. The eleven smaller businesses had less than 10 employees with revenues of slightly more than $300 K. These smaller businesses were specialized in marine product distribution and performed little processing.

5.2.5. Outlook for 2003

Even though data on the processing sector is not yet available for 2003, we will present estimates based on preliminary data on landings. According to these values, landed value dropped 4% to $34.6 million in Gaspé South in 2003, while we observed a decline of more than 8% for Quebec and a gain of 2% for the Gaspé Area. We can expect that data on Gaspé South's processing industry in 2003 will show a stall or a slight drop in sales. We also expect a slight drop in the proportion in the regional production but an increase in its share for the total production for Quebec.

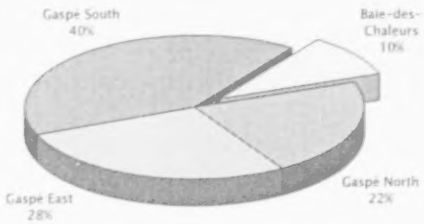
6. The Fishing Industry in Baie-des-Chaleurs: An Overview

6.1. Marine Fisheries

6.1.1. Evolution of Landings

In 2003, the Baie-des-Chaleurs region posted landings of 2 200 t worth $8.2 million, which made up 7% of the total volume and 10% of the total value in the Gaspé Area. For Quebec, the fishing activities in this sub-sector accounted for 4% of the total landed volumes and 5% of the total landed value.

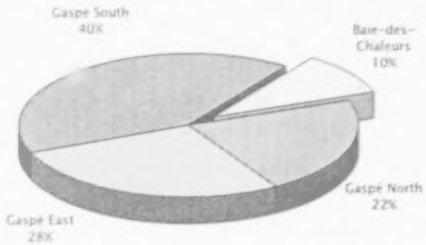
Graph 83: Evolution of Landings in the Gaspé Area by Sub-Sector, in Volume, 2003p



Volume of Landings in Gaspé Area: 32 037 t

Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Graph 84: Evolution of Landings in the Gaspé Area by Sub-Sector, in Value, 2003p



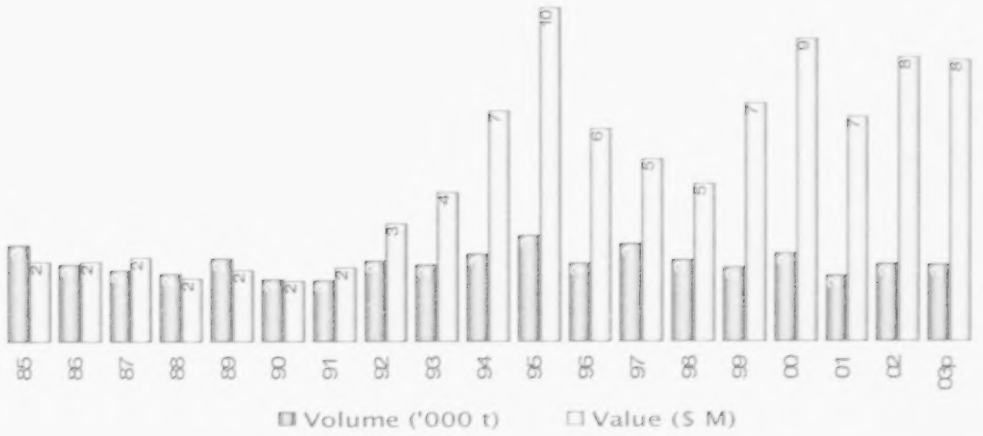
Value of Landings in Gaspé Area: 84,8 M$

Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

In 2003, landings were made in 13 fishing ports in Baie-des-Chaleurs. The most important ports in terms of volume are, in order: Paspebiac, Saint-Godefroy and Carleton. In terms of value, the ports of Paspebiac and Saint-Godefroy rank first and second, followed with Shigawake.

On the provincial scale, the Port of Paspebiac, with landings of 1 150 t worth $6.5 million, ranks 13th in terms of landed volume and 6th in terms of landed value. Saint-Godefroy, with landings of 450 t worth $1.1 million, ranks 29th and 32nd in terms of volume and value, respectively.

Graph 85: Evolution of Landings in the Fishing Industry, Baie-des-Chaleurs, 1985-2003p



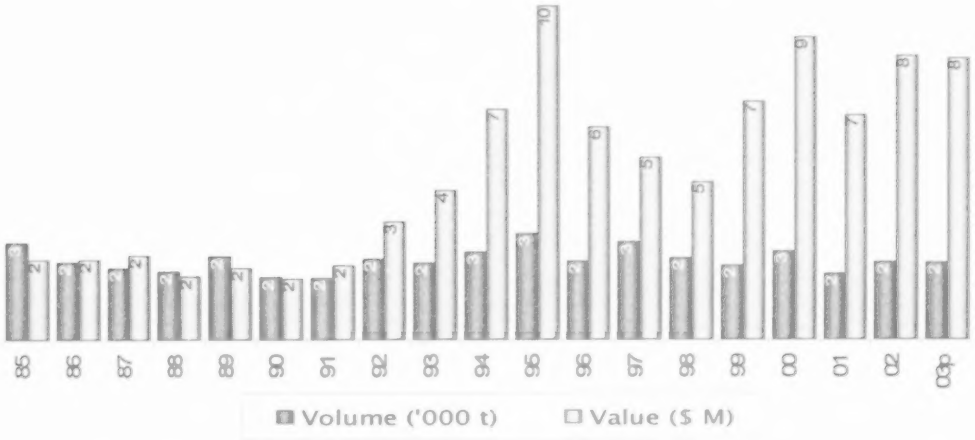
Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Since 1985, landings in Baie-des-Chaleurs have relatively hovered between 2 000 t and 3 000 t. Compared with the other sub-sectors in the Gaspé Area, Baie-des-Chaleurs was not significantly affected by the first moratoriums on groundfish. Baie-des-Chaleurs, where landings consist mostly of crustaceans, benefited from the jump in landed value for snow crab and lobster in the middle of the 1990s. In addition, snow crab posted a record landed value in 1995 with $9.7 million. Annual landed value for crustaceans averaged $7.8 million in the last five years.

6.1.2. Species Landed

In terms of volume and value, snow crab is the main landed species in Baie-des-Chaleurs. Snow crab makes up 41% of the landed volume and nearly two-thirds of the commercial fishing revenues in this maritime sub-sector. Pelagic fish fishing ranks second in terms of volume with close to 800 t. However, the landed value of this resource is low with only 3% ($300K) of the total landed value in Baie-des-Chaleurs.

Graph 85: Evolution of Landings in the Fishing Industry, Baie-des-Chaleurs, 1985-2003p



Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

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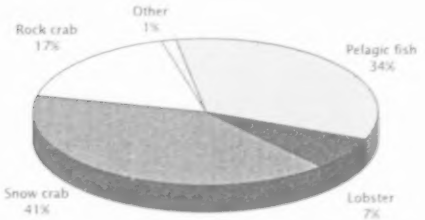
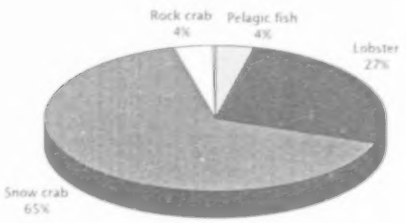
Graph 86: Breakdown of Species Landed, in Volume, Baie-des-Chaleurs, 2003p



Total Volume of Landings: 2 241 t

Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Graph 87: Breakdown of Species Landed, in Value, Baie-des-Chaleurs, 2003p



Total Value of Landings: 8,2 M$

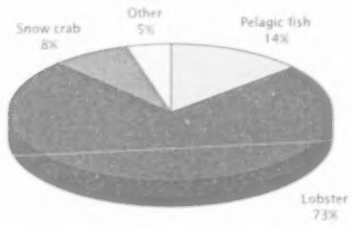
Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Lobster generates more than 25% of the commercial fishing revenues in Baie-des-Chaleurs with a landed value of $22 million. However, this resource accounts for only 7% of the landed volume, which can be explained by its high landing price. Rock crab is also important for this sub-sector with landings of 400 t, worth $300 K.

6.1.3. Workforce

In 2003, 66 fishing businesses were active in the sub-sector of Baie-des-Chaleurs. Of this number, 49 were fishing for lobster, 9 for pelagic fish, 5 for snow crab and 3 for other species.

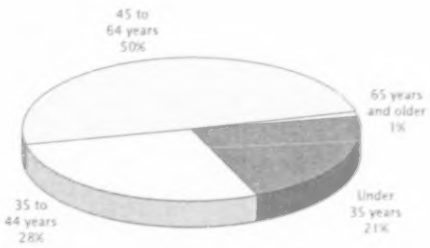
Graph 88: Distribution of Fishing Businesses According to Main Species Landed, Baie-des-Chaleurs, 2003p



66 fishing businesses

Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Graph 89: Distribution of Fishermen and Fisherman's Helpers According to Age, Baie-des-Chaleurs, 2003p

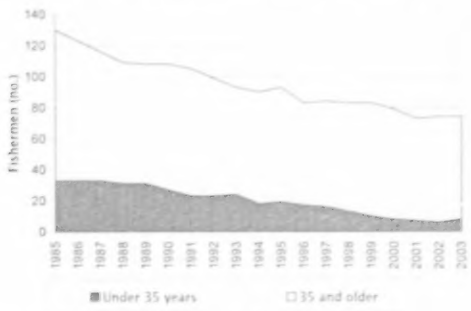


Fishermen and fisherman's helpers: 160

Source: Statistical Services, DFO, Quebec Region
for fishermen and BAPAP for fisherman's helpers.
Compilation: DRPE, DFO, Quebec Region

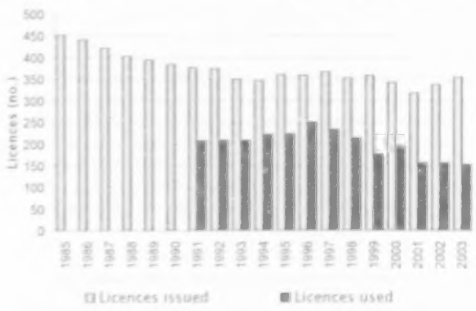
In Baie-des-Chaleurs, 43% of the fishermen and fisherman's helpers are aged 45 and over, 30% aged between 35 and 44, and 27% aged less than 35. We observe a larger percentage of people aged 45 and over than the average in Quebec. Also, the portion of fishermen and fisherman's helpers aged 35 and below is 4% lower than the average in Quebec. In 2003, this sub-sector was home to slightly more than 150 fishermen and fisherman's helpers.

Graph 90: Evolution of the Number of Fishermen According to Age, Baie-des-Chaleurs, 1985-2003p



Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Graph 91: Evolution of the Number of Licences According to Status, Baie-des-Chaleurs, 1985-2003p

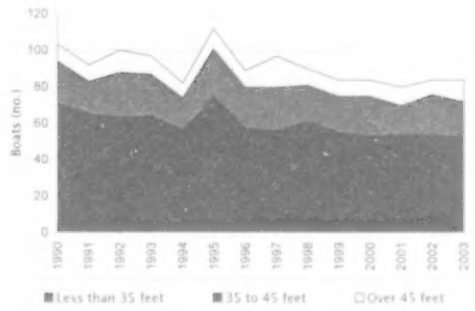


Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region
Note: Data on active licences is not available for the period before 1991.

Since 1985, the number of fishermen in Baie-des-Chaleurs dropped more than 40% to reach about 75 fishermen in 2003. During the same period, the number of licences issued has declined more than 20% to slightly more than 350 licences issued in this sub-sector in 2003. The average number of licences held by each fisherman went from 3.5 in 1985 to 4.8 in 2003.

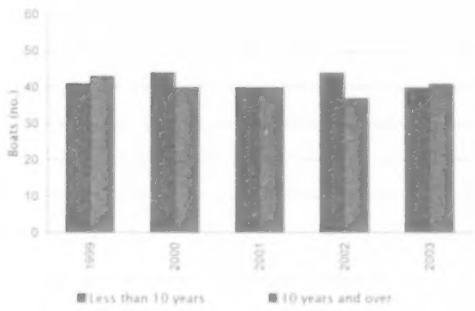
A significant part of the licences held by fishermen usually remain inactive. In fact, only 43% of the licences issued in this sub-sector were active in 2003 compared with more than 50% in the middle of the 1990s. This level is slightly higher than the average of 38% Quebec has posted since 1991.

Graph 92: Evolution of the Number of Active Fishing Boats According to Size, Baie-des-Chaleurs, 1990-2003p



Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Graph 93: Evolution of the Number of Active Fishing Boats According to Age, Baie-des-Chaleurs, 1999-2003p



Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

The number of active boats in Baie-des-Chaleurs decreased slightly between 1990 and 2003. In 1990, there were 103 active fishing boats in this sub-sector compared with 84 in 2003. Since 1990, the number of fishing boats in the three categories has followed a constant trend. In 2003, 62% of the boats were less than 35 feet in length, 24% were between 35 and 45 feet in length, and 14% were more than 45 feet in length.

The percentage of boats aged ten years and older is above the provincial average. In fact, these boats make up half of the boats used for commercial fishing in 2003 compared with the provincial average of 28%.

6.2. Processing of Fishery Resources

6.2.1. Evolution of Sales

The processing industry in Baie-des-Chaleurs consists of seven businesses. In 2002, these businesses purchased[16] $9.1 million worth of fish and seafood and sold it for $24.1 million, which accounted for 14.9% of the sales for the Gaspé Area and 8.2% for Quebec.

Graph 94: Evolution of the Sale of Marine Products in the Maritime Sectors of Quebec, 2002

Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Graph 95: Evolution of Sales for Processing Businesses in Baie-des-Chaleurs, 1990 to 2002

Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Marine product sales increased significantly between 1998 and 2002, after having remained stable between 1990 and 1997. High landings of snow crab explains this increase. Sales posted a record of $24.1 million in 2002, a level consistent with the levels between 1990 and 1997, after a drop to $11.3 million in 2001. The 2002 level is due to lower prices and smaller landed volume of snow crab.

6.2.2. Species Sold

In 2002, snow crab sold for $19.1million in Baie-des-Chaleurs, which accounted for nearly 80% of the production for this sub-sector. Most of this crab was sold cooked and frozen. Two other species have seen their sales exceed $1 million: lobster ($1.5 million) and rock crab ($1.1 million). They are followed by species that sold for between $200 K and $1 million: cod, herring, white hake, scallop and mackerel. The production of white hake in

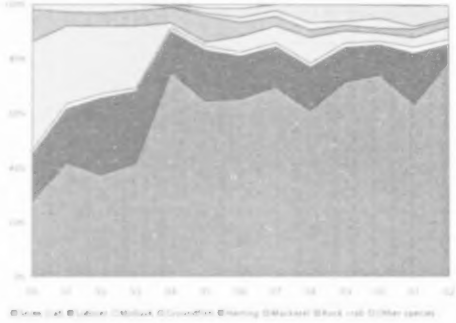
[16] 78.3% of the purchases made by these businesses come from Baie-des-Chaleurs ports, 21.5% from the rest of Gaspé.

Baie-des-Chaleurs has been the highest in Quebec for the last few years. In 2002, white hake sold for $450 K, which represented 93% of the total sales for Quebec.

Graph 96: Value and Composition of Production in Baie-des-Chaleurs, 2002

Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Graph 97: Composition of Species Sold, % of Value, Baie-des-Chaleurs, 1990 to 2002



Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

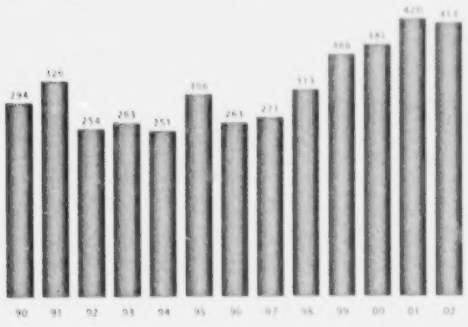
Between 1990 and 1994, the portion of groundfish in the total sales of marine products of Baie-des-Chaleurs dropped significantly from 40% to 2%. This decline follows the trend that started in 1987 when groundfish accounted for 71% of the sales in this sub-sector. Snow crab, whose share of total sales jumped from 28% to 75% between 1990 and 1994, made up for the decline in groundfish sales.

Between 1995 and 2002, the share of the species sold in Baie-des-Chaleurs stayed relatively the same. However, we can outline the rock crab production that started in 1994 and accounted for nearly 10% of the total sales in this sub-sector in 2001.

6.2.3. Labour

In Baie-des-Chaleurs, the number of people working in the marine product processing sector remained relatively stable between 1990 and 1997 and increased significantly starting in 1998. This trend is relatively the same as the sales trend. Employment went from 294 in 1990 to 271 in 1997 and to 414 in 2002. We observe that despite a significant decline of production in 2001, the number of jobs posted a new high at 420. In 2002, of the 413 jobs in Baie-des-Chaleurs, 240 were in the processing and sales sectors for snow crab. We must note that these numbers refer to the maximum number of employees and the fact that most of these jobs are seasonal.

Graph 98: Number of Jobs in the Marine Product Processing Sector in Baie-des-Chaleurs, 1990 to 2002



Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Table 10: Main Businesses in Baie-des-Chaleurs, Marine Product Processing Sector , 2002

BUSINESS NAME	COMMUNITY NAME	NUMBER OF JOBS	PRODUCTION
UNIPÊCHES	PASBEBIAC	250 to 275	$30 to $35 M
PRODUITS MARINS DE ST-GODEFROY	SAINT-GODEFROI	75 to 100	Under $5 M
ASSEL'S SEA FOODS	SHIGAWAKE	25 to 50	Under $5 M
POISSONNERIE LA COQUILLE	RIVIÈRE-CAPLAN	10 to 25	Under $5 M
POISSONNERIE DE LA GARE	CAPLETON	Under 10	N/A
POISSONNERIE DE LA BAIE	BON-VENTURE	Under 10	N/A
POISSONNERIE LOUIS POIRIER	SAINT-SIMEON	Under 10	N/A
TOTAL		415	$24.1 M

Sources: MAPAQ, CRIQ and DFO, Quebec Region
Compilation: DFPE, DFO, Quebec Region

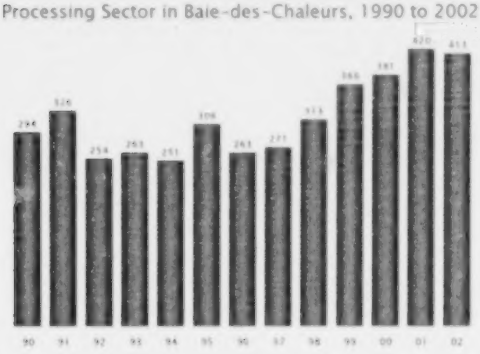
6.2.4. Businesses

In 2002, the marine product processing sector in Baie-des-Chaleurs consisted of seven businesses distributed among the same number of communities. The two largest businesses in this sub-sector, Unipêche and Produits marins de St-Godefroy (see Table 10), accounted for most of the sales and jobs in the industry. The five other businesses, smaller in size, had an average of 15 employees and revenues of less than $250 K. These businesses specialized in marine product distribution and performed little processing.

6.2.5. Outlook for 2003

Even though data on the processing sector is not yet available for 2003, we will present estimates based on preliminary data on landings. According to these values, landed value dropped only 1% to $8.2 million in Baie-des-Chaleurs in 2003, while we observed a decline of more than 8% for Quebec and a gain of 2% for the Gaspé Area. We can expect that data on Baie-des-Chaleurs's processing industry in 2003 will show a stall in sales. We also expect an increase in its share for the total production for Quebec.

Graph 98: Number of Jobs in the Marine Product Processing Sector in Baie-des-Chaleurs, 1990 to 2002



Source: Statistical Services, DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

Table 10: Main Businesses in Baie-des-Chaleurs, Marine Product Processing Sector , 2002

BUSINESS NAME	COMMUNITY NAME	NUMBER OF JOBS	PRODUCTION
UNIPÊCHES	PASBÉBIAC	250 to 275	$10 to $25 M
PRODUITS MARINS DE ST-GODEFROY	SAINT-GODEFROI	75 to 100	Under $5 M
ASSEL'S SEA FOODS	SHIGAWAKE	25 to 50	Under $5 M
POISSONNERIE LA COQUILLE	RIVIÈRE-CAPLAN	10 to 25	Under $5 M
POISSONNERIE DE LA GARE	CARLETON	Under 10	N/A
POISSONNERIE DE LA BAIE	BONAVENTURE	Under 10	N/A
POISSONNERIE LOUIS POIRIER	SAINT-SIMÉON	Under 10	N/A
TOTAL		413	$24.1 M

Sources: MAPAQ, CRIQ and DFO, Quebec Region
Compilation: DRPE, DFO, Quebec Region

6.2.4. Businesses

In 2002, the marine product processing sector in Baie-des-Chaleurs consisted of seven businesses distributed among the same number of communities. The two largest businesses in this sub-sector, Unipêche and Produits marins de St-Godefroy (see Table 10), accounted for most of the sales and jobs in the industry. The five other businesses, smaller in size, had an average of 15 employees and revenues of less than $250 K. These businesses specialized in marine product distribution and performed little processing.

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Even though data on the processing sector is not yet available for 2003, we will present estimates based on preliminary data on landings. According to these values, landed value dropped only 1% to $8.2 million in Baie-des-Chaleurs in 2003, while we observed a decline of more than 8% for Quebec and a gain of 2% for the Gaspé Area. We can expect that data on Baie-des-Chaleurs's processing industry in 2003 will show a stall in sales. We also expect an increase in its share for the total production for Quebec.

SUMMARY AND CONCLUSION

The Gaspé Area maritime sector has undergone some significant changes over the last several years. From a demographic point of view, the Gaspé Area suffered a significant decline in its population. Between 1996 and 2001, population in the Gaspé Area dropped more than 10%, with the sub-sector of Gaspé East experiencing the largest decline.

The fishing industry is still very important for the economy in the Gaspé Area. In 2001, more than 3 500 people were working in this industry. The last census also outlines the importance of fishing activities for the primary and secondary sectors in the Gaspé Area and, more specifically, in Gaspé East and Gaspé South. In fact, 40% of jobs in the primary and secondary sectors in Gaspé East are associated with the fishing industry and this percentage reaches 65% in Gaspé South.

The Gaspé Area is the most important maritime sector in Quebec with more than 50% of the total landings and captures estimated at $85 million in 2003. This is the second best year after 1995. Snow crab is the main landed species in terms of volume and value for all sectors except Gaspé East where shrimp ranks first. Lobster is also very important for Gaspé South and Baie-des-Chaleurs since it makes up more than the third of the value.

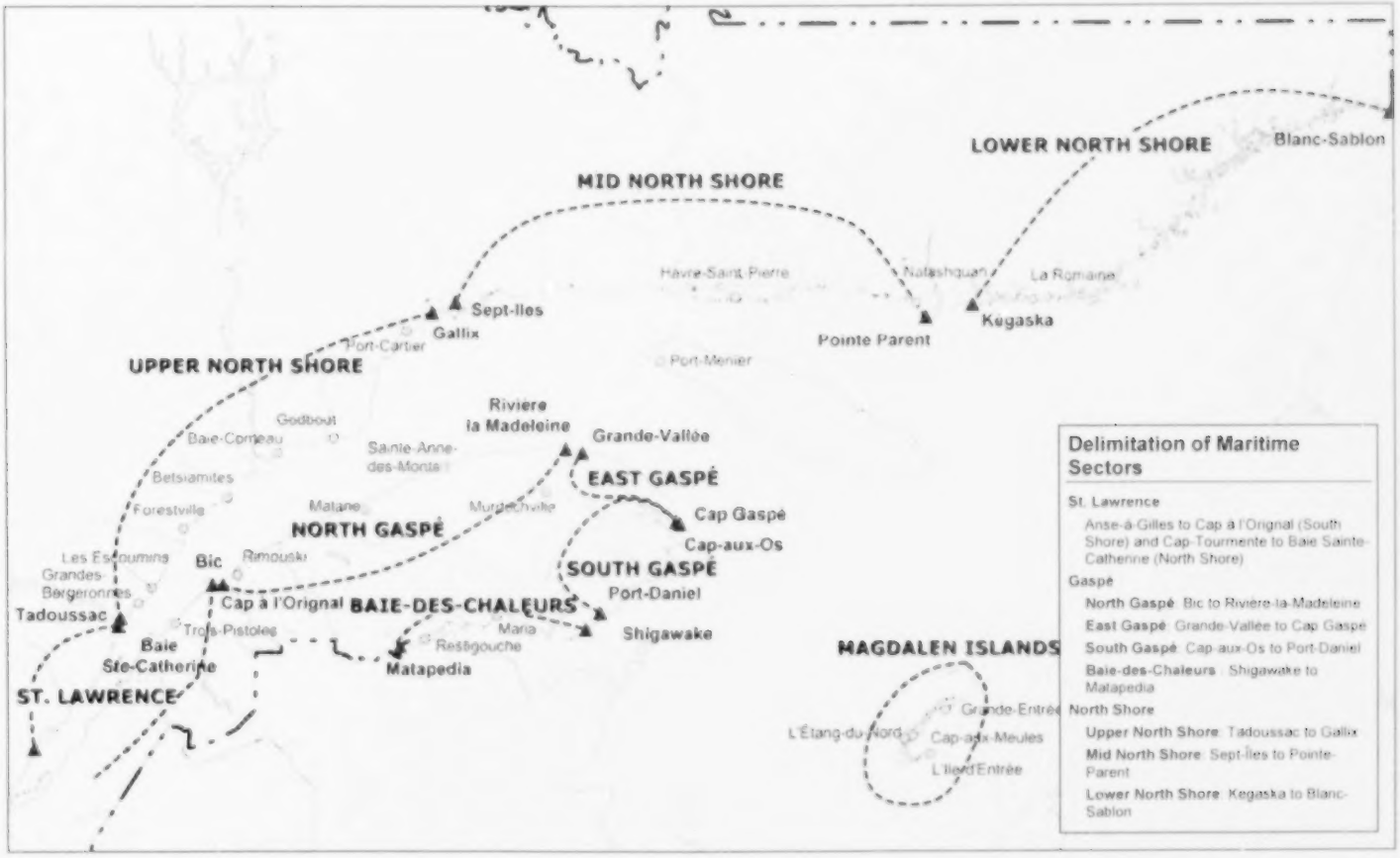
Nearly 450 fishing businesses were active in 2003 and their main fishing activity was crustaceans. In fact, lobster was the main landed species for nearly half of these businesses. In addition, 25% of these businesses were mostly involved in snow crab and 10% in shrimp. The fishing of crustaceans is therefore very important to the economic activity in the Gaspé Area.

Sales by processing businesses consisted mostly of crustaceans. The year 2002 is a record year for this industry with more than $160 million in sales, in which crab accounted for $65 million and shrimp for $43 million.

Even though the Gaspé Area has posted high numbers in landed values and production in the last few years, it is still faced with major issues: demographic decline, a high level of unemployment, seasonal jobs, limited groundfish fishing and a significant variation in employment in the processing sector. However, we have observed a growing mariculture industry and the development of new fishing activities, such rock crab and toad crab.

APPENDIX

MARITIME SECTORS IN QUEBEC



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